


# **MyEZClaim User's Guide**





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**TranSolutions, Inc.  
22015 N. Calle Royale  
Scottsdale, AZ 85255  
Telephone: 480.473.2453**

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# HOW TO CONTACT TRANSOLUTIONS



**Phone:**(480) 473-2453

**FAX:**(480) 473-2454

**E-Mail:**[sales@TranSolutionsInc.com](mailto:sales@TranSolutionsInc.com)

**Web Page:**[www.TranSolutionsInc.com](http://www.TranSolutionsInc.com)

**Mail:**TranSolutions, Inc.  
22015 North Calle Royale  
Scottsdale, AZ 85255

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# GETTING STARTED

# 1

Tracking your freight claims can be a time consuming process. Not tracking these claims can mean expensive losses for your company from unrecovered dollars due to damaged and lost products by the carrier. myEZClaim makes it easy to enter your claim and include all pertinent tracking information. With the simple click of the mouse, you can generate and print claim forms, credit/debit memos, and regional claim templates. Using myEZClaim, you can track the status of your claims and generate follow-up letters at the appropriate time, from any remote location using an Internet browser and Acrobat Reader. In addition, myEZClaim has a number of built-in detail reports, allowing you to quickly review the consolidated results of your claim activity for any user designated time period.

myEZClaim is setup to provide maximum flexibility in the way it is used. This document provides instructions for use of myEZClaim from one location or multiple locations as long as the proper user setup has been completed. The site administrator for your corporate account has all the training and instructions on registering new users for this Internet version of EZClaim. So, relax and read these instructions and have an enjoyable experience on the web.

myEZClaim stores information regarding your claims in a database. A database is a group of files that contains related information. There can be many records within each of these files. A record is a collection of information regarding a specific item.

Another way of explaining a database uses your file cabinet as an example. Your file cabinet contains multiple drawers (*files*) each of which can contain different information. Perhaps one drawer contains information regarding the companies with which you do business, and another drawer contains information regarding the claims that have been submitted against some of the companies in the company drawer. Within each drawer are folders (*records*), one for each company, and maybe one for each claim that has been submitted. The file cabinet contains files and records, thus making it a type of database. A database allows for quick and easy retrieval of information.

When you use myEZClaim for the first time, you need to enter some basic information regarding the businesses that can be involved with your claims. For example, you'll need to enter your current consignees, shippers, carriers, etc. Then when you enter a claim, their information is already in the database and you can select the appropriate business from a list. This makes the process of entering a new claim much faster. MyEZClaim already includes information on some of the claim reasons and major carriers.

Finally, you enter the list of products that you regularly order or ship. Product cost and unit weight can be added during the filing process or entered into the database prior to beginning the first claim. *Product information is required for all new Loss and Damage claims.* Again, by entering this information first, you simplify the process of creating new claims. All of this information is used to enter new claims.

The following is an overview of the things you should do when you first use myEZClaim:

Create records for each of the following:

- |                       |                    |
|-----------------------|--------------------|
| ■ Consignees          | ■ Carriers         |
| ■ Shippers            | ■ Claimants        |
| ■ Companies           | ■ Recipients       |
| ■ Users               | ■ Products         |
| ■ Disposition Codes   | ■ Release Values   |
| ■ Conversion Rates    | ■ Liability Limits |
| ■ Business Groups     | ■ Product Lines    |
| ■ Subrogation Reasons | ■ Task Groups      |
| ■ Task Rules          |                    |

## MYEZCLAIM INTERFACE

The myEZClaim interface simplifies navigation through the claim application. MyEZClaim includes a navigation bar and a shortcut bar. The navigation bar is organized into groups: My Account, Claims, Reports, and Administration. Within each of these groups is a set of shortcuts (shortcut buttons) to MyEZClaim's most frequently used features.

Clicking one of the group tabs activates that group and displays the associated shortcuts. Each of the shortcuts activates a unique page within the myEZClaim page. For example, clicking the **Claims** group tab displays the Claims shortcuts buttons: Outstanding Claims, Closed Claims, POD Claims, Converted PODs, Cancelled PODs, All Claims, Find Claim, Filter View, Claim Forms, Claim Letters, and View Generated PDFs. Clicking the Outstanding Claims shortcut button opens the Outstanding Claims page; the current page banner is displayed at the top of the current window.

The screenshot shows the MyEZClaim.net web application interface. Key components are annotated with boxes and arrows:

- Current Page Banner:** Located at the top right, displaying user information: "Member: myEZClaim® Administrator | Company: Demo Site | Access Level: Site Administrator" and links for "Home | Help | Logout".
- Group Tabs:** A horizontal bar below the banner with tabs for "My Account", "Claims", "Reports", "Tasks", "Administration", and "Dashboard".
- Shortcut Buttons:** A vertical sidebar on the left under the "My Account" tab, listing items like "Messages", "Companies", "Consignees", "Carriers", "Shippers", "Claimants", "Products", "Insurance Companies", "Recipients", "Users", "Resolution Methods", and "Registration".
- Expandable Shortcut Button:** An arrow points to the "Resolution Methods" item in the sidebar, which has a plus icon.
- Current Page:** A central box labeled "Current Page" with the text "Based on selected shortcut".
- Table:** A table titled "Here are the last 20 Claims you've worked on." with columns "Claim Number" and "Carrier". It lists 20 claims, with some in bold (e.g., LD1545A, HMTEST001, LD100000032434). Below the table is a "Page List Box" with a text input "Set the number of rows you want to be displayed on all page lists (except here):" set to "50" and a "Save" button.

Clicking any of the items displayed in the current page opens that item. If the item is a claim, address or lookup value, the item opens for editing. If the item is a report, the report selection criteria dialog box opens.

When you logon to MyEZClaim, you are taken to the Messages page. This page lists the last twenty claims that have been entered. Claims shown in bold lettering have had the basic information entered but have not had any work done since.

Below the claim list is a page list box that allows you to set the number of records to be displayed on all page lists. Move your mouse over the box and enter the desired number. Click **Save**. A list of any messages that have been sent to you is also displayed on this page. From the Messages page, you can send, read, and delete messages and edit any of the last twenty claims that were entered. (For instructions on sending messages see, "Working with Messages").

**MYEZCLAIM NAVIGATION BAR**

Group Tabs	Shortcut Buttons	Contents of Current Page
My Account	Messages Companies Consignees Carriers Liability Limits Conversion Rates Shippers Claimants Products Business Groups Product Lines Insurance Companies Recipients Users Profiles Calculation Method Disposition Codes Release Values	List of messages sent to you List of Companies List of Consignees List of Carriers List of Liability Limits List of Conversion Rates List of Shippers List of Claimants List of Products List of Business Groups List of Product Lines List of Insurance Companies List of Recipients List of Users List of configured profiles for myEZClaim users  List of Disposition Codes List of Release Values
Claims	Outstanding Claims Closed Claims Pending Claims Converted Pending Claims Cancelled Pending Claims All Claims Claim Search Options Find Claim Filter View Claim Letters  Claim Forms Claim Letters Scheduler  View Generated PDFs Payments Claim Payments Subrogation Payments Import from Excel	List of all claims matching selected shortcut (Outstanding, Closed, Pending, Cancelled Pending Claims, Converted Pending Claims, or All)     List of fields on which you can search Allows you to search on specific fields Allows you to generate 30, 60, 90, 120 day follow-up letters and general letters. Allows you to generate a claim form Allows you to schedule the generation of 30, 60, 90, 120 day follow-up letters. List of the generated claim forms and letters  Allows you to enter a batch of claim payments Allows you to enter a batch of subrogation payments Allows you to select an Excel file to import claims into myEZClaim

Group Tabs	Shortcut Buttons	Contents of Current Page
Reports	Outstanding Reports Detail Reports Graphs Reports Addresses Reports Lookup Reports Letters Built-In Letters Custom Letters Reports Scheduler  Ad Hoc Report	List of reports for selected shortcut    Allows you to automatically run reports and have them emailed to users. Allows you to create your own custom reports.
Tasks	Open Tasks Closed Tasks All Tasks Task Configuration Task Groups  Task Rules Email Alerts Manage Tasks	List of all tasks matching selected shortcut (Open, Closed, All)   Groups of myEZClaim users that can have tasks assigned to them or be notified when a task is closed. List of rules for creating a new task Form emails sent for new, overdue, and closed tasks Allows you to automatically create tasks based on your task rules and assign them to the groups specified when a claim is created.

Group Tabs	Shortcut Buttons	Contents of Current Page
Administration	Codes Status Codes Reason Codes Cancel Codes Rejection Codes Denial Codes Types Claim Types Payment Types Activity Types Document Types Write-Off Reasons Subrogation Reasons Additional Charges Transportation Modes Diary Categories Claim Groups Custom Fields Reports Letters Built- In Letters Custom Letters Users Signing Security Error Handling Settings Claims Archiving Import Service Setting	<p>List of existing lookup values for selected shortcut. All values listed in Administration are maintained by the myEZClaim Administrator.</p> <p>List of all users including login history.</p>
Dashboard		<p>The Dashboard tab is restricted to users who have the Read Dashboard role.</p> <p>The Dashboard Shows:</p> <p>Top 20 Carrier Claims Filed in the last 12 months</p> <p>Top 20 Carriers Who Owe Money</p> <p>Top 20 Carriers with Claims Paid in the Last 12 Months</p>

## WORKING WITH THE LISTS OF BUSINESSES

After you open MyEZClaim for the first time, you want to enter information regarding the businesses that can be involved with your claims. You'll be creating lists of consignees, carriers, shippers, etc. Of course, you may not be able to enter all of the businesses at first. As you continue to use MyEZClaim, you will have claims involving businesses that haven't yet been entered. You can add new businesses at any time.

You will occasionally find it necessary to update your existing records. For example, a Consignee's address, phone number or contact may change. Once you update the address information, any future references to that business (such as follow-up letters, claim forms, etc.) will include the new information. While authority to delete certain records are restricted by your account administrator, you may find it necessary to delete records. For example, if a carrier is entered in error and you don't use it, you may want to remove their information. However, you cannot remove any business that is associated with a claim.

The process of creating, editing and deleting an address record is the same regardless of the business type with which you are working. The only difference would be the shortcut you select to open the address listing window. The instructions provided outline the general procedure. You need to select the appropriate shortcut for the business type with which you are working.

### BUSINESS TYPES

The following is a brief overview of the types of businesses for which you need to create records and the shortcut selection to be used to access the address information.

Shortcut	Business Type
<b>Companies</b>	The Company is the business that is filing the shipment claim. This can be a division of a larger company, the same firm as the Consignee, or a 3 <sup>rd</sup> party claims processing firm.
<b>Consignees</b>	The Consignee is the business which was to receive the final shipment. This could be the same firm as the Company.
<b>Carriers</b>	The Carrier is the business that has accepted possession of the shipment and the responsibility for ensuring the shipment is delivered to the consignee.
<b>Shippers</b>	The Shipper is the business that has contracted the carrier to move the shipment to its final destination. The shipper could be a 3 <sup>rd</sup> party warehouse, or it could be the same firm as the Claimant.
<b>Claimants</b>	The Claimant is the company that contracted the carrier to deliver the shipment. The claimant can also be the same firm as the Shipper.
<b>Insurance Companies</b>	The Insurance Company is the business that is responsible for the claim.

### ADDING A BUSINESS RECORD

When you first use MyEZClaim, you may want to enter a list of companies with whom you do business. This makes the claims processing task much simpler. However, if you choose, you can enter the information on an *as needed basis*.

1. Click the **My Account** tab. The My Account page opens.
2. Click the shortcut for the business type (Companies, Consignees, Carriers, Shippers, Claimants, or Insurance Companies).
3. Click the **Add** button. The **New <BusinessType>** dialog box opens.



myEZClaim® Carrier Properties - Internet Explorer provided by Dell

http://86.124.36.102/myezclaimNet\_2008/Navigation/My%20Account/Pages/Carriers\_Po

**New Carrier** Save Delete Close

code:

scac:

full name:

email address:

website url:

contact name:

contact email:

region:

in my carrier: ☐ (Checked = True : Unchecked = False)

is active: ☒ (Checked = True : Unchecked = False)

do not generate letters: ☐ (Checked = True : Unchecked = False)

updated by:

last update:

**Address** **Phone #**

line 1:

line 2:

city:

state/province:

zip/country:  UNITED STATES

updated by:

last update:

Internet | Protected Mode: On 100%

4. Enter a value for the **Code**, using any combination of characters. This value is used for tracking information on this business. You must use a unique Code for each business you enter — regardless of business type.
5. *For Carriers only.* If applicable, enter the Standard Carrier Alpha Code (SCAC) in the **SCAC** box.
6. Move to the **Full Name** box and enter the name of the business.
7. Move to the **Email Address** box and enter the email address for the business.
8. Move to the **Website URL** box and enter the website address for the business. Example:  
http://www.mycarrier.com *OR* www.mycarrier.com. If you enter a website address, you can access that website from the claims.
9. *For Consignees only.* Enter a location in the **Location** box.
10. Move to the **Contact Name** box and enter a contact name for the business.
11. Move to the **Contact Email** box and enter an email address for the contact person.
12. Move to the **Region** box and select the region from the list.
13. *For Consignees only.* Click the **Company** button and select a Company from the list.
14. Check **In My <Business Type>** if you want to have this business type in your list.

15. *For Companies only.* If you want users to have access to this company, check **Available to All Users**.
16. *For Carriers only.* If you do not want to automatically generate letters for this carrier, check **Do Not Generate Letters**.
17. *For Companies only.* Use **Logo File** if you want a different logo printed on claim forms, 30 Day Letter, 60 Day Letter, 90 Day Letter and the 120 Day Letter.
  - ▣ Click the **Browse** button. The **Choose File** dialog box opens.
  - ▣ Locate and select the logo you want to use for claim forms and letters.
  - ▣ Click the **Open** button to return to the **New Company** dialog box.

### Address Tab

18. Click the **Address** tab.

The screenshot shows a web-based form with three tabs: **Address** (selected), **Phone #**, and **Claimant Override**. The **Address** tab contains the following fields:

- line 1:** A text input field.
- line 2:** A text input field.
- city:** A text input field.
- state/province:** A dropdown menu.
- zip/country:** A text input field followed by a dropdown menu showing **UNITED STATES**.
- updated by:** A text input field.
- last update:** A text input field.

At the bottom of the browser window, the status bar shows "Done", "Internet | Protected Mode: On", and a zoom level of "100%".

19. Move to the **Line 1** box and enter the first address line.  
Some businesses may require two lines for their address. You can use **Line 1** and **Line 2** in these cases. For example, you can enter both the street address and the post office box information for a business. Move to the **Line 2** box, if necessary, and enter the second address line.
20. Move to the **City** and enter the city.
21. Move to the **Zip/Country** box and enter the zip code and select the country from the list. If the default country is not correct, enter the first character and keep pressing the key until the country appears. If you've entered both a street address and a post office box, enter the zip code for the post office box.
22. Once you have entered the correct country, enter the **State/Province**.

### Phone # Tab

23. Click the **Phone #** tab.

The screenshot shows a web browser window with three tabs: 'Address', 'Phone #', and 'Claimant Override'. The 'Phone #' tab is active. The form contains the following fields: 'phone/ext:' with a text input and a small extension input; 'fax:' with a text input; 'cellular:' with a text input; 'other/ext:' with a text input and a small extension input; 'updated by:' with a text input; and 'last update:' with a text input. The browser's status bar at the bottom shows 'Done', 'Internet | Protected Mode: On', and a zoom level of '100%'.

24. Move to the **Phone/Ext** box and enter the business' phone number and extension.
25. Move to the **Fax** box and enter the business' Fax number.
26. Move to the **Cellular** box and enter the cellular phone number.
27. Move to the **Other/Ext** box and enter an alternate phone number.
28. Click the **Save** button. Click the **Close** button if you do not want to save this new record. Either way, you return to the address listing window. If you saved the new record, it is displayed in the list. Otherwise, there is no new entry. The current date is automatically placed in **Last Update** and your name is automatically placed in **Updated By**. Whenever the record is modified or saved, this information is updated.

### Claimant Override Tab

*For Companies Only.* Use this when you want Claimant Name and Address information to be different on claim forms and letters for this company. Information entered on this tab is used for claim forms, 30 Day Letter, 60 Day Letter, 90 Day Letter and the 120 Day Letter. If you do not want to use this feature, leave it blank.

29. Click the **Claimant Override** tab.

The screenshot shows the same web browser window, but now the 'Claimant Override' tab is active. At the top of the form is a checkbox labeled 'override claimant address on claim form and letters'. Below this are several fields: 'full name:' with a text input; 'line 1:' with a text input; 'line 2:' with a text input; 'city:' with a text input; 'state/province:' with a dropdown menu; 'zip/country:' with a text input and a dropdown menu currently showing 'UNITED STATES'; 'updated by:' with a text input; and 'last update:' with a text input. The browser's status bar at the bottom remains the same.

30. Check the box next to **Override claimant address on claim forms and letters**.
31. In the **Full Name** box, enter the name as you want it to print on claim forms and letters.

32. Enter the rest of the address information as you want it to print on claim forms and letters.
33. Click the **Save** button.

### EDITING AN EXISTING ADDRESS RECORD

You can edit an existing record at any time. The process of editing an existing record is similar to that of creating a new record.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for the business type.
3. Click the record you wish to modify. You can use the search function to shorten your search time. The **<Business Type> Properties** dialog box opens with the current information displayed.  
Use the TAB key or your mouse to move from box to box within the dialog box.
4. Move to the appropriate box and make the required change(s). You can make as many changes as necessary.
5. Click the **Save** button, to save the new record. Click the **Close** button if you do not want to save this new record. Either way, you return to the address listing window.

### DELETING AN ADDRESS RECORD

You can delete an existing record at any time as long as it is not associated with a claim. You should use caution when deleting a record; once it is deleted, it cannot be recovered.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for the business type.
3. Click the record you wish to delete.
4. Click the **Delete** button. A message is displayed asking “Are you sure you want to do this?” Click **OK** to delete the record, click **Cancel** to leave the record and return to the address listing window. If you click **OK**, the record is permanently removed from the list, as long as it is not associated with any claims. If it is associated with any claims, an error message is displayed. Click **Close** to return to the address listing window. The record is not deleted.

## WORKING WITH THE LISTS OF REASONS

MyEZClaim includes lists of reasons for why a claim might be issued, rejected, denied or cancelled. Also included is a list of payment types, liability limits, conversion rates, liability limits, and subrogation reasons. These reasons are referred to as lookup values, or codes. The lookup values are used within a claim as you are completing the claim form.

Most lookup values are maintained by the MyEZClaim Administrator and cannot be modified, but you need to enter lookup values for *Disposition Codes*, *Release Values*, *Conversion Rates*, *Liability Limits*, *Subrogation Reasons*, and *Transportation Modes*. You do not need to enter every possible lookup value at first. As you continue to use MyEZClaim, you will have claims involving new values and you can create the necessary records at that time. You may find it necessary to modify these codes or delete a code, either of which can be done at any time. However, you cannot delete a lookup value that is used in a claim.

The process of creating, editing, and deleting a record is the same regardless of the lookup value type. The only difference would be the shortcut you select. The instructions given outline a general procedure. You need to select the appropriate shortcut for the lookup value type with which you are working.

## LOOKUP VALUES

The following is a brief description of the lookup values you need to create and the shortcut to be used to access the lookup value information.

Shortcuts	Lookup Value
<b>Disposition Codes</b>	Disposition Codes explain the disposition of a product and what percentage of the product value will be discounted.
<b>Release Values</b>	Release values define the claim total per line item, based on the carrier's contract limitations for liability.
<b>Conversion Rates</b>	Conversion Rates are the exchange rate of one currency to another.
<b>Liability Limits</b>	Liability Limit is the maximum amount that a carrier will cover.
<b>Subrogation Reasons</b>	Subrogation Reasons explain why a subrogation payment was made.
<b>Transportation Modes</b>	Transportation Modes indicate how the shipment was made.

## ADDING A DISPOSITION CODE OR RELEASE VALUE RECORD

You can add a lookup value record at any time. Once a lookup value has been added to the list, you can use that lookup value in a claim.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Calculation Methods**. The Calculation Methods expands showing a listing of the method types.
3. Click the shortcut for **Disposition Code** or **Release Value**.
4. Click the **Add** button and the **New <Lookup Type>** dialog box opens.

The screenshot shows a web browser window with the title 'myEZClaim® Release Value Properties - Internet Explorer provided by ...'. The address bar displays the URL 'http://86.124.36.102/myezclaimNet\_2008/Navigation/My%20Account/Pages/ReleaseValue.aspx'. The main content area of the browser shows a dialog box titled 'New Release Value'. At the top of the dialog box are three buttons: 'Save', 'Delete', and 'Close'. Below these buttons are several input fields: 'code:' with an empty text box, 'display:' with an empty text box, 'value:' with a text box containing the number '0', 'is default:' with an unchecked checkbox and the text '(Checked = True : Unchecked = False)', 'updated by:' with an empty text box, and 'last update:' with an empty text box. The browser's status bar at the bottom indicates 'Internet | Protected Mode: On' and a zoom level of '100%'.

5. Move to the **Code** box and enter a value using any combination of characters. This value is used for reporting purposes. You must use a unique code for each type of lookup value you enter.

6. Move to the **Display** box and enter the lookup value's description.
7. Move to the **Value** box.
  - ▣ If this is a **Disposition Code**, enter the percentage of discount that is to be applied to the product. For example, if the product should be discounted 25%, enter 25. (There are two calculation methods: (Qty. \* Price) \* Disposition Percentage OR (Price \* Weight) \* Disposition Percentage.)
  - ▣ If this is a **Release Value**, enter the release value to be used when calculating the line item total. (The calculation is Qty \* Weight \* Release Value.)
8. Select the **is Default** check box if you want this to be the default product disposition or release value.



**NOTE:** If more than one Disposition Code or Release Value has the **is Default** check box selected, the most recently updated value with the check box selected is used as the default. Or, if multiple values were updated on the same date, the last value in an alphabetically sorted list is used.

9. Click the **Save** button to save the new record. Click the **Close** button if you do not want to save this new record. Either way, you return to the listing page. If you saved the new record, it is displayed in the list. Otherwise, there is no new entry. The current date is automatically placed in **Last Update** and your name is automatically placed in **Updated By**. Whenever the record is modified or saved, this information is updated.

#### EDITING AN EXISTING DISPOSITION CODE OR RELEASE VALUE RECORD

You can edit a lookup value record at any time. The process of editing an existing record is similar to that of creating a new record.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Calculation Methods**. The Calculation Method expands showing a listing of the method types.
3. Click the shortcut for **Disposition Code** or **Release Value**.
4. Click the record to be modified. The **<Lookup Type> Properties** dialog box opens with the current information displayed.

Use the TAB key, or your mouse, to move from box to box within the dialog box.
5. Move to the box you wish to modify and make the required change(s).
6. Click the **Save** button to save the new record. Click the **Close** button if you do not want to save this new record. Either way, you return to the listing page. The current date is automatically placed in the **Last Update** box and your name is automatically placed in **Updated By**. Whenever the record is modified or saved, this information is updated.

#### DELETING A DISPOSITION CODE OR RELEASE VALUE RECORD

You can delete an existing lookup value record at any time as long as it is not associated with a claim. You should use caution when deleting a record; once it is deleted it cannot be recovered.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Calculation Method**. The Calculation Method expands showing a listing of the method types.
3. Click the shortcut for **Disposition Code** or **Release Value**.
4. Click the record to be deleted. The properties dialog box opens with the current information displayed.
5. Click the **Delete** button. A message is displayed asking "Are you sure you want to do this?" Click **OK** to delete the record, click **Cancel** to leave the record and return to the listing window. If you click **OK**, the record is permanently removed from the list, as long as it is not associated with any claims. If it is associated with any claims, an error message is displayed. Click **Close** to return to the address listing window. The record is not deleted.

## ADDING A LIABILITY LIMIT

You can add a liability limit record at any time after you have added the carrier. Once a liability limit has been added to the list, you can use it in a claim.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Carriers**. The Carriers shortcut expands showing more options.
3. Click the **Liability Limits** shortcut button.
4. Click the **Add Liability Limits** button. The **New Carrier Liability Limit** dialog box opens.

myEZClaim® Carrier Liability Limit - Internet Explorer provided ...

http://86.124.36.102/myezclaimNet\_2008/Navigation/My%20Account/Pages/Li

**New Carrier Liability Limit** **Save** **Close**

carrier:

max amount:  USD

effective date:

updated by:

last update:

amount	effective date	updated by	last update
--------	----------------	------------	-------------

Internet | Protected Mode: On 100%

5. Select a **Carrier** from the drop-down list.
6. In the **Max Amount** box, enter the maximum amount of the carrier's liability.
7. In the **Effective Date** box, enter the date that the liability is effective OR click the **Calendar** button and select the date from the calendar.
8. Click the **Save** button to save the new record. Click the **Close** button if you do not want to save this new record. Either way, you return to the listing page.

If you saved the new record, it is displayed in the list. Otherwise, there is no new entry. The current date is automatically placed in **Last Update** and your name is automatically placed in **Updated By**. Whenever the record is modified or saved, this information is updated.

## EDITING A LIABILITY LIMIT

You can edit a liability limit record at any time. The process of editing an existing record is similar to that of creating a new record.

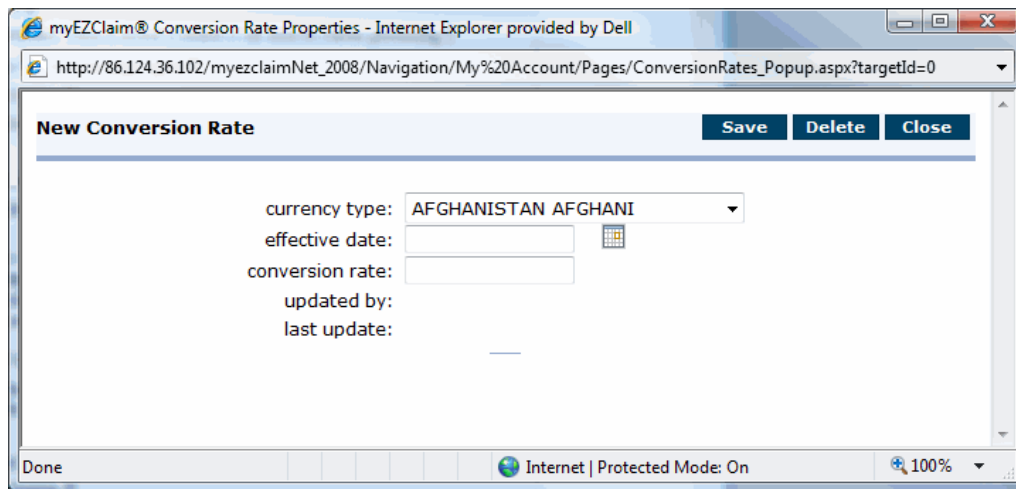
1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Carriers**. The Carriers shortcut expands showing more options.
3. Click the **Liability Limits** shortcut button.
4. Select the Liability Limit to edit. The **Carrier Liability Limit** dialog box opens.
5. Make the necessary changes.

6. Click the **Save** button to save the record. Click the **Close** button if you do not want to save this record. Either way, you return to the listing page. The current date is automatically placed in **Last Update** and your name is automatically placed in **Updated By**. Whenever the record is modified or saved, this information is updated.

### ADDING A CONVERSION RATE

You can add a conversion rate record at anytime. Once a record is added it can used in claims processing.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Carriers**. The Carriers shortcut expands showing more options.
3. Click the **Conversion Rates** shortcut button.
4. Click the **Add Conversion Rate** button The New Conversion Rate dialog box opens.



5. Select the **Currency Type** from the drop-down list.
6. In the **Effective Date** box, enter the date that the conversion rate is effective OR click the **Calendar** button and select the date from the calendar.
7. Click the **Save** button to save the new record. Click the **Close** button if you do not want to save this new record. Either way, you return to the listing page. If you saved the new record, it is displayed in the list. Otherwise, there is no new entry. The current date is automatically placed in **Last Update** and your name is automatically placed in **Updated By**. Whenever the record is modified or saved, this information is updated.

### EDITING A CONVERSION RATE

As conversion rates change on a regular basis, you will want to update the rates on a periodic schedule. You can edit the conversion rate record at any time. The process of editing an existing record is similar to that of creating a new record.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Carriers**. The Carriers shortcut expands showing more options.
3. Click the **Conversion Rates** shortcut button.
4. Select the conversion rate to edit. The conversion rate opens.
5. Make the necessary changes.

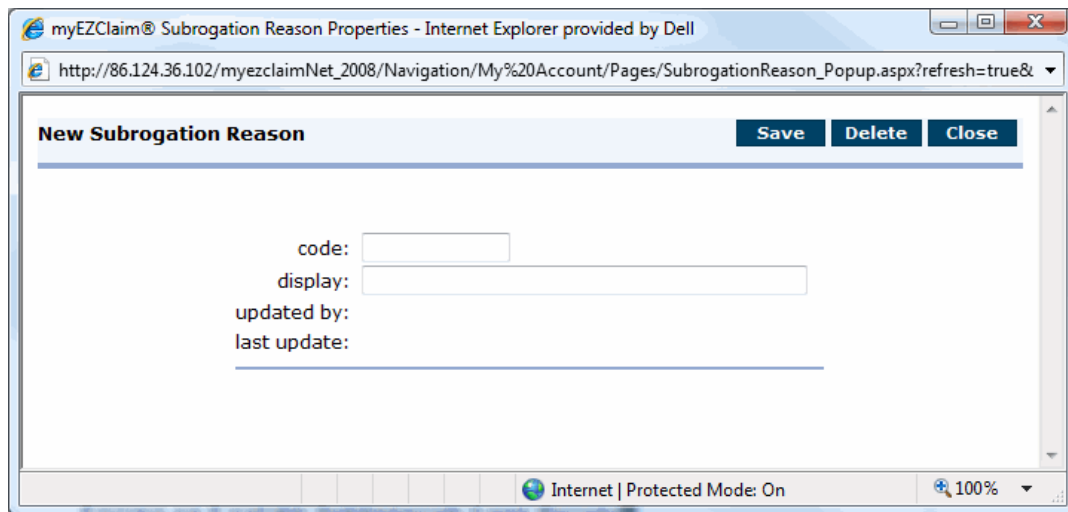


6. Click the **Save** button to save the record. Click the **Close** button if you do not want to save this record. Either way, you return to the listing page. The current date is automatically placed in **Last Update** and your name is automatically placed in **Updated By**. Whenever the record is modified or saved, this information is updated.

### ADDING A SUBROGATION REASON

You can add a subrogation reason record at any time. Once a subrogation reason has been added to the list, you can use that reason in a claim.

1. Click the **Administration** group tab. The Administration page opens.
2. Click the shortcut for **Subrogation Reasons**.
3. Click the **Add Subrogation Reason** button. The **New Subrogation Reason** dialog box opens.

The screenshot shows a web browser window titled "myEZClaim® Subrogation Reason Properties - Internet Explorer provided by Dell". The address bar shows the URL "http://86.124.36.102/myezclaimNet\_2008/Navigation/My%20Account/Pages/SubrogationReason\_Popup.aspx?refresh=true&". The main content area is titled "New Subrogation Reason" and contains four input fields: "code:", "display:", "updated by:", and "last update:". To the right of the "code:" field is a small text box. To the right of the "display:" field is a larger text box. The "updated by:" and "last update:" fields are empty. At the top right of the dialog box are three buttons: "Save", "Delete", and "Close". The browser's status bar at the bottom shows "Internet | Protected Mode: On" and a zoom level of "100%".

4. Move to the **Code** box and enter a value using any combination of characters. This value is used for reporting purposes. You must use a unique code for each reason you enter.
5. Move to the **Display** box and enter the description for the subrogation.
6. Click the **Save** button to save the new record. Click the **Close** button if you do not want to save this new record. Either way, you return to the listing page. If you saved the new record, it is displayed in the list. Otherwise, there is no new entry. The current date is automatically placed in **Last Update** and your name is automatically placed in **Updated By**. Whenever the record is modified or saved, this information is updated.

### EDITING AN EXISTING SUBROGATION CODE RECORD

You can edit a subrogation record at any time. The process of editing an existing record is similar to that of creating a new record.

1. Click the **Administration** group tab. The Administration page opens.
2. Click the shortcut for **Subrogation Reasons**.
3. Click the record to be modified. The **Subrogation Reasons Properties** dialog box opens with the current information displayed.

4. Move to the box you wish to modify and make the required change(s).
5. Click the **Save** button to save the new record. Click the **Close** button if you do not want to save this new record. Either way, you return to the listing page. The current date is automatically placed in the **Last Update** box and your name is automatically placed in **Updated By**. Whenever the record is modified or saved, this information is updated.

### **DELETING A SUBROGATION REASON**

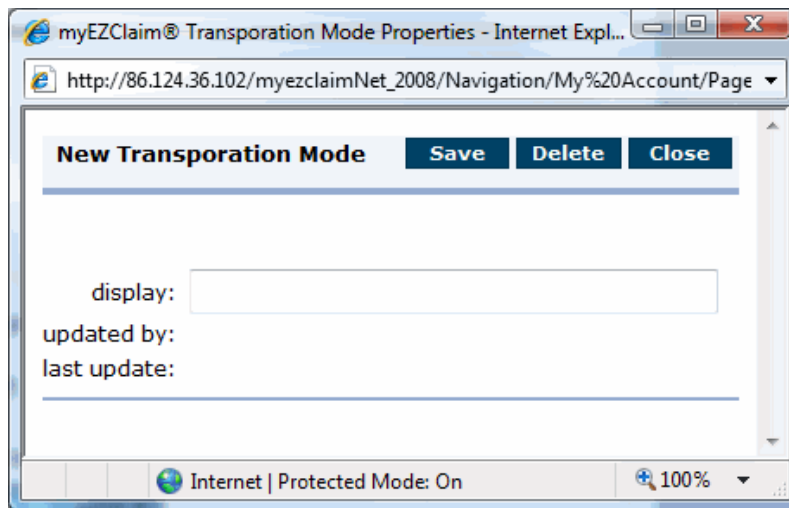
You can delete an existing subrogation reason at any time as long as it is not associated with a claim. You should use caution when deleting a record; once it is deleted it cannot be recovered.

1. Click the **Administration** group tab. The Administration page opens.
2. Click the shortcut for **Subrogation Reasons**.
3. Click the record to be deleted. The properties dialog box opens with the current information displayed.
4. Click the **Delete** button. A message is displayed asking “Are you sure you want to do this?” Click **OK** to delete the record, click **Cancel** to leave the record and return to the listing window. If you click **OK**, the record is permanently removed from the list, as long as it is not associated with any claims. If it is associated with any claims, an error message is displayed. Click **Close** to return to the address listing window. The record is not deleted.

### **ADDING A TRANSPORTATION MODE**

You can add a transportation mode record at any time. Once a transportation mode has been added to the list, you can use that mode in a claim.

1. Click the **Administration** group tab. The Administration page opens.
2. Click the shortcut for **Transportation Modes**.
3. Click the **Add** button and the **New Transportation Mode** dialog box opens.



The screenshot shows a web browser window titled "myEZClaim® Transportation Mode Properties - Internet Expl...". The address bar displays "http://86.124.36.102/myezclaimNet\_2008/Navigation/My%20Account/Page". The main content area is titled "New Transportation Mode" and contains three buttons: "Save", "Delete", and "Close". Below the buttons, there are three input fields: "display:" followed by a text box, "updated by:" followed by a text box, and "last update:" followed by a text box. The browser's status bar at the bottom shows "Internet | Protected Mode: On" and a zoom level of "100%".

4. Move to the **Display** box and enter the name for the transportation mode. You must use a unique name for each transportation mode you enter.
5. Click the **Save** button to save the new record. Click the **Close** button if you do not want to save this new record. Either way, you return to the listing page. If you saved the new record, it is displayed in the list. Otherwise, there is no new entry. The current date is automatically placed in **Last Update** and your name is automatically placed in **Updated By**. Whenever the record is modified or saved, this information is updated.

### EDITING AN EXISTING TRANSPORTATION MODE RECORD

You can edit a transportation mode record at any time. The process of editing an existing record is similar to that of creating a new record.

1. Click the **Administration** group tab. The Administration page opens.
2. Click the shortcut for **Transportation Modes**.
3. Click the record to be modified. The **Transportation Modes Properties** dialog box opens with the current information displayed.
4. Move to the box you wish to modify and make the required change(s).
5. Click the **Save** button to save the new record. Click the **Close** button if you do not want to save this new record. Either way, you return to the listing page. The current date is automatically placed in the **Last Update** box and your name is automatically placed in **Updated By**. Whenever the record is modified or saved, this information is updated.

### DELETING A TRANSPORTATION MODE RECORD

You can delete an existing transportation mode reason at any time as long as it is not associated with a claim. You should use caution when deleting a record; once it is deleted it cannot be recovered.

1. Click the **Administration** group tab. The Administration page opens.
2. Click the shortcut for **Transportation Modes**.
3. Click the record to be deleted. The properties dialog box opens with the current information displayed.
4. Click the **Delete** button. A message is displayed asking “Are you sure you want to do this?” Click **OK** to delete the record, click **Cancel** to leave the record and return to the listing window. If you click **OK**, the record is permanently removed from the list, as long as it is not associated with any claims. If it is associated with any claims, an error message is displayed. Click **Close** to return to the address listing window. The record is not deleted.

## WORKING WITH PRODUCTS LIST

The product master list contains the list of products for which you can enter a claim. As with the other lists, you can create new product records at any time. You can also update or delete existing records at any time.

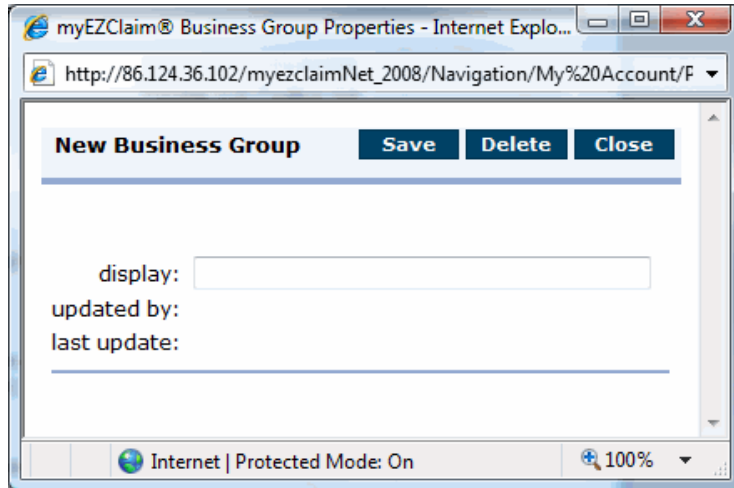
You can capture product line detail with the Business Group and Product Line information by having it linked to the product. This allows for detailed reporting of losses within the product classes. This information is not required to enter a product.

### ADDING A BUSINESS GROUP

You can add a business group at any time. Once you add a business group to myEZClaim, you can use the group when creating or modifying a product.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Products**. The Products shortcut expands showing more options.

3. Click the shortcut for **Business Groups**. The Business Groups page opens. A list of Business Groups is displayed and sorted by name.
4. Click the **Add Business Group** button. The **New Business Group** dialog box opens.



5. In the **Display** box, enter the name of the business group.
6. Click the **Save** button. Click the **Close** button if you do not want to save this new record. Either way, you are returned to the Business Groups page. If you saved the new record, it is displayed in the list.

### **EDITING A BUSINESS GROUP**

You can edit an existing business group record at any time. The process of editing an existing record is similar to that of creating a new record.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Products**. The Products shortcut expands showing more options.
3. Click the shortcut for **Business Groups**. The Business Groups page opens. A list of Business Groups is displayed and sorted by name.
4. Click the Business Group you want to edit. The **Business Group Properties** dialog box opens.
5. Make the necessary changes and then click the **Save** button. You are returned to the Business Group page.

### **DELETING A BUSINESS GROUP**

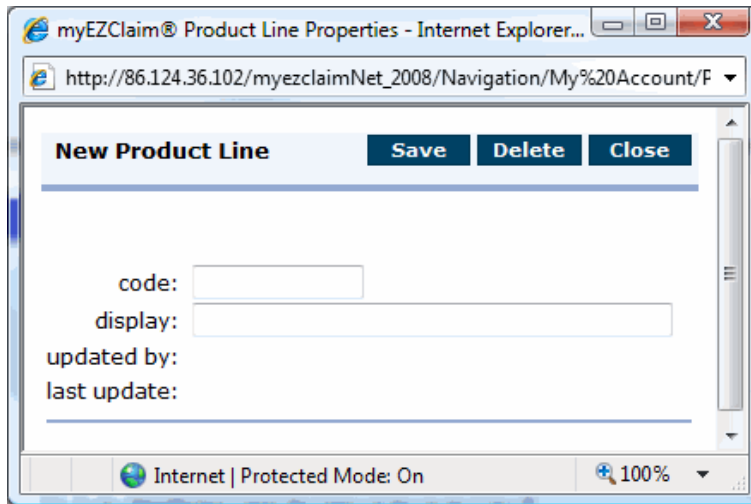
You can delete an existing record at any time as long as it is not associated with a claim or a product. You should use caution when deleting a record; once it is deleted it cannot be recovered.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Products**. The Products shortcut expands showing more options.
3. Click the shortcut for **Business Groups**. The Business Groups page opens. A list of Business Groups is displayed and sorted by name.
4. Click the Business Group you want to delete. The **Business Group Properties** dialog box opens.
5. Click the **Delete** button. A message is displayed asking “Are you sure you want to do this?” Click **OK** to delete the record, click **Cancel** to leave the record and return to the listing window. If you click **OK**, the record is permanently removed from the list. Click **Close** to return to the address listing window.

## ADDING A PRODUCT LINE

You can add a product line at any time. Once you add a product line to myEZClaim, you can use it when creating or modifying a product.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Products**. The Products shortcut expands showing more options.
3. Click the shortcut for **Product Lines**. The Product Lines page opens. A list of Product Lines is displayed and sorted by code.
4. Click the **Add Product Line** button. The **New Product Line** dialog box opens.



5. In the **Code** box, enter the code for the product line. The code must be unique.
6. In the **Display** box, enter the name of the product line.
7. Click the **Save** button. Click the **Close** button if you do not want to save this new record. Either way, you are returned to the Product Lines page. If you saved the new record, it is displayed in the list.

## EDITING A PRODUCT LINE

You can edit an existing product line record at any time. The process of editing an existing record is similar to that of creating a new record.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Products**. The Products shortcut expands showing more options.
3. Click the shortcut for **Product Lines**. The Product Lines page opens. A list of Product Lines is displayed and sorted by code.
4. Click the Product Line you want to edit. The **Product Line Properties** dialog box opens.
5. Make the necessary changes and then click the **Save** button. You are returned to the Product Lines page.

## DELETING A PRODUCT LINE

You can delete an existing record at any time as long as it is not associated with a claim or a product. You should use caution when deleting a record; once it is deleted it cannot be recovered.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Products**. The Products shortcut expands showing more options.
3. Click the shortcut for **Product Lines**. The Product Lines page opens. A list of Product Lines is displayed and sorted by code.
4. Click the Product Line you want to delete. The **Product Line Properties** dialog box opens.
5. Click the **Delete** button. A message is displayed asking “Are you sure you want to do this?” Click **OK** to delete the record, click **Cancel** to leave the record and return to the listing window. If you click **OK**, the record is permanently removed from the list. Click **Close** to return to the address listing window.

## ADDING A PRODUCT TO THE PRODUCT LIST

You can add a product to the Product Master List at any time. Once a product has been added to the list, you can use that product in a claim.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Products**. The Products page opens.
3. Click the **Add Product** button. The **New Product** dialog box opens.

myEZClaim® Product Properties - Internet Explorer provided by Dell

http://86.124.36.102/myezclaimNet\_2008/Navigation/My%20Account/Pages/Products\_

**New Product** Save Delete Close

product id:

display:

sub product:

price: 0 USD

weight: 0

actual rate: 0

business group:

product line:

in my products: ☐ (Checked = True : Unchecked = False)

updated by:

last update:

Currency shown in US DOLLAR

Internet | Protected Mode: On 100%

4. Enter a value for the **Product ID**. This value is used for tracking information on this product. You must use a unique ID for each product you enter. If you use a code that has already been assigned to another product, an error message is displayed.

5. Move to the **Display** box and enter a description for the product. You cannot save a product without a description.
6. Move to the **Price** box and enter the non-discounted price of the product.
7. Move to the **Weight** box and enter the weight of the product.
8. Move to the **Actual Rate** box and enter the discounted price of the product.
9. Select a **Business Group** from the list. *This is not required to add a product to the Product List.*
10. Select a **Product Line** from the list. *This is not required to add a product to the Product List.*
11. Check **in my products** to have the product shown in your products list when entering a claim.
12. Click the **Save** button. Click the **Close** button if you do not want to save this new record. Either way, you are returned to the Products page. If you saved the new record, it is displayed in the list.

### EDITING AN EXISTING PRODUCT RECORD

You can edit an existing product record at any time. The process of editing an existing record is similar to that of creating a new record.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Products**. The Products page opens. A list of Products is displayed and sorted by **Code**.
3. Click the record to be modified. The **Product Properties** dialog box opens.
4. Move to the appropriate box and make the required change.
5. Click the **Save** button. Click the **Close** button if you do not want to save this new record. Either way, you are returned to the Products page. If you saved the new record, it is displayed in the list.

### DELETING A PRODUCT RECORD

You can delete an existing record at any time, as long as it is not associated with a claim. You should use caution when deleting a record; once it is deleted it cannot be recovered.

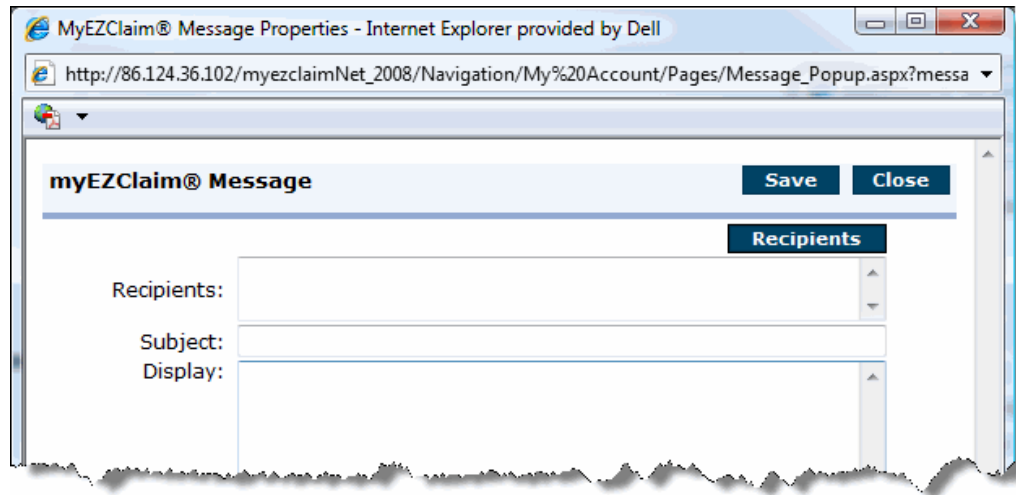
1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Products**. The Products page opens. A list of Products is displayed and sorted by **Code**.
3. Click the record to be deleted. The **Product Properties** dialog box opens.
4. Click the **Delete** button. A message is displayed asking “Are you sure?” Click **OK** to delete the record, click **Cancel** to leave the record and return to the listing window. If you click **OK**, the record is permanently removed from the list, as long as it is not associated with any claims. If it is associated with any claims, an error message is displayed. Click **Close** to return to the address listing window.

## WORKING WITH MESSAGES

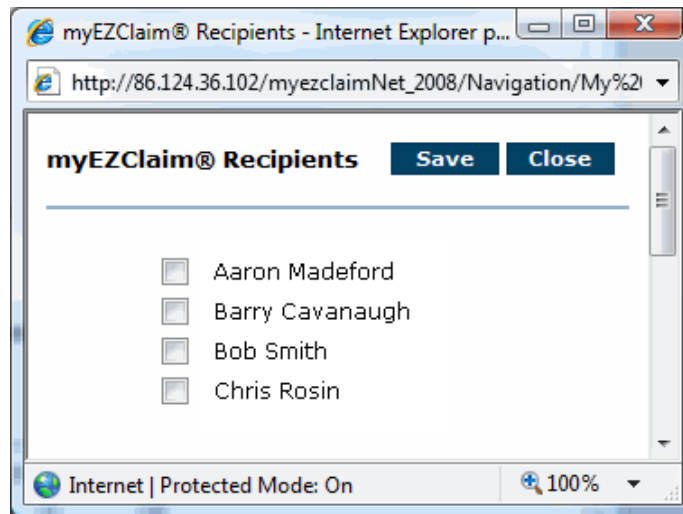
When you first logon to MyEZClaim, you are taken to the Messages page. From the Message page, you can see the last twenty claims entered for your company and any messages you have. Messages can be sent to users that you have set up and to the MyEZClaim Administrator. The reasons why you would send messages to someone can vary anywhere from a reminder to generate a report to asking a colleague to review a claim.

### SENDING A MESSAGE

1. Click the **My Account** group tab. The My Account page opens.
2. From the Messages page, click the **Add** button. The **New Message** dialog box opens.



3. Click the **Recipients** button. The **Recipients** dialog box opens.



4. Select the people you want to send a message to and then click the **Save** button. The **Recipients** dialog box closes and you are returned to the **New Message** dialog box.
5. In the **Subject** box, type a subject for your message.
6. In the **Display** box, type your message. When you are done, click the **Save** button. This will send your message.



## READING A MESSAGE

1. Click the **My Account** group tab. The My Account page opens.
2. Click the message you want to read. The message opens.
3. When you are done reading the message, click the **Close** button or click the **Delete** button to delete the message.

## DELETING A MESSAGE

You should use caution when deleting a message; once it is deleted it cannot be recovered.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the message you want to delete. The message opens.
3. Click the **Delete** button to delete the message. A message is displayed asking “Are you sure you want to do this?” Click **OK** to delete the message, click **Cancel** to leave the message. If you click **OK**, the message is permanently removed.

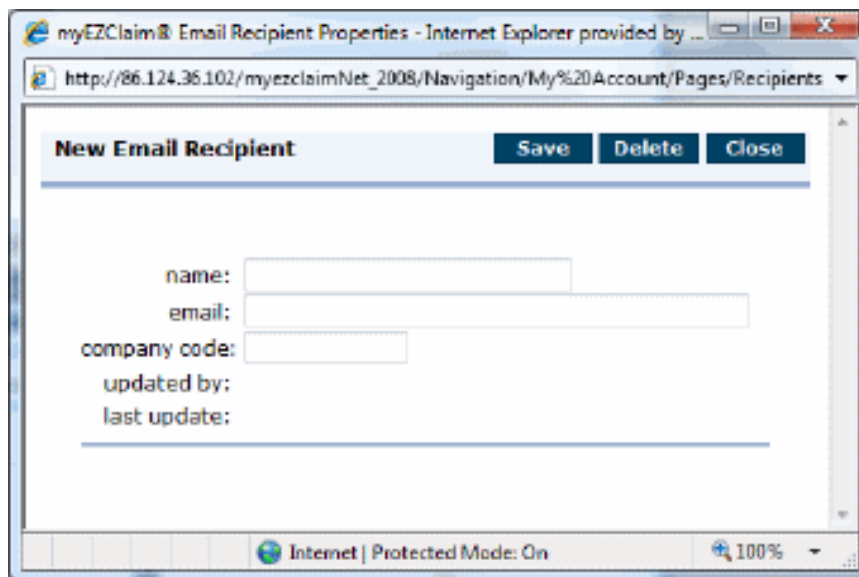
## WORKING WITH E-MAIL RECIPIENTS

When you first setup MyEZClaim, you will need to create e-mail recipient records for people who you will be e-mailing claims and documents. With myEZClaim you have the ability to e-mail claims and documents to multiple recipients. (See “E-Mailing Claims and Documents” for more information.)

### ADDING E-MAIL RECIPIENTS

The e-mail recipients list is an e-mail address book of people who you will be e-mailing claims and documents. E-mail recipients can be added at any time.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the **Recipients** shortcut button. The Email Recipients page opens.
3. Click the **Add Recipient** button. The **New Email Recipient** dialog box opens.



The screenshot shows a web browser window titled "myEZClaim® Email Recipient Properties - Internet Explorer provided by ...". The address bar shows the URL "http://86.124.36.102/myezclaimNet\_2008/Navigation/My%20Account/Pages/Recipients". The main content area displays a form titled "New Email Recipient" with buttons for "Save", "Delete", and "Close". The form fields are: "name:" (text box), "email:" (text box), "company code:" (text box), "updated by:" (text box), and "last update:" (text box). The status bar at the bottom indicates "Internet | Protected Mode: On" and "100%".

4. In the **Name** box, enter the name of the e-mail recipient.
5. In the **email** box, enter the e-mail address of the recipient.

6. Click the **Save** button. Click the **Close** button if you do not want to save this new record. Either way, you are returned to the Email Recipients page. If you saved the new record, it is displayed in the list.

### EDITING E-MAIL RECIPIENTS

You can edit an existing e-mail recipient record at any time. The process of editing an existing record is similar to that of creating a new record.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the **Recipients** shortcut button. The Email Recipients page opens.
3. To show all email recipients, click the **Run** button.
4. Select the recipient you want to edit. The recipient dialog box opens.
5. Make the necessary changes.
6. Click the **Save** button. Click the **Close** button if you do not want to save this new record. Either way, you are returned to the Email Recipients page. If you saved the new record, it is displayed in the list.

### DELETING E-MAIL RECIPIENTS

You should use caution when deleting an e-mail recipient record; once it is deleted it cannot be recovered.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the **Recipients** shortcut button. The Email Recipients page opens.
3. To show all email recipients, click the **Run** button.
4. Select the recipient you want to delete. The recipient dialog box opens.
5. Click the **Delete** button. A message is displayed asking “Are you sure you want to do this?” Click **OK** to delete the recipient, click **Cancel** to leave the record and return to the listing window. If you click **OK**, the record is deleted.

# PROCESSING CLAIMS

# 2

MyEZClaim allows you to process and track two types of claims, Loss and Damage claims and Overcharge claims. Loss and Damage claims are used for claims on products that were lost or damaged in shipment. You must have product information to complete a loss and damage claim. Overcharge claims are used for excessive charges on the freight bill. You must have the freight bill information in order to complete the overcharge claim.

Once you have completed the “Getting Started” section, you’re ready to begin entering your claims. If you have a claim that involves a lookup value that you haven’t yet entered, you need to enter that information first and then enter your claim. You do not have to enter your businesses or products before your claims; you can enter new businesses and products from within the claim form.

Processing claims involves several steps. You need to first enter your claims. After entering your claims, you generate the claim forms that can be sent to the carriers. You also generate follow-up letters for claims that haven’t yet been closed. MyEZClaim generates letters for claims that are 30, 60, 90 and 120 days past due. It’s as easy as a click of the mouse. Finally, as you receive acknowledgements of, or payments against, your claims, you update your claims to reflect these events.

The following is an overview of the steps involved in claims processing:

- Entering Claims
- Generating Follow-Up Letters
- Generating Claim Forms
- Entering Claim Updates

## ENTERING LOSS AND DAMAGE CLAIMS

The information you enter for a claim is used when you generate the claim form and follow-up letters.

1. Click the **Claims** group tab. The Show Outstanding Claims page opens.
2. Click the **New Claim** button. The **Create a New Claim** dialog box opens.

myEZClaim® Create Claim - Internet Explorer provided ...

http://86.124.36.102/myezclaimNet\_2008/Navigation/Claims/Pages/Cre

**Create a New Claim** [Apply] [Close]

select the claim type:

☒ loss and damage ☐ overcharge

☐ return authorization ☐ vendor

this is a Pending claim:

☐ (Checked = True : Unchecked = False)

select the claim number:

☒ system generated ☐ user assigned

claim prefix: LD

Internet | Protected Mode: On 100%

## PROCESSING CLAIMS

### Entering Loss and Damage Claims

3. Select the **Loss and Damage** option.

If this is a pending claim (Proof of Delivery or POD), select the check box for **This is a Pending Claim**.

Accept the **System Generated** claim number *or*  
select **User Assigned** and enter your claim number.

4. Click the **Apply** button. The claim window opens.



**NOTE:** The Claim Number is not assigned until the claim is saved.

myEZClaim® Claims Properties - Internet Explorer provided by Dell

http://test2008.myezclaim.com/Navigation/Claims/Pages/Claims\_Popup.aspx?claimType=1&numberType=1&claimNumber=LD&isPODClaim=False

Claim Number: (pending) **Delete** **Save** **Print** **Email** **Reassign** **Reverse** **Close**

<b>Company</b>	claim rep: Jane Demo	status: Outstanding
<b>Claimant</b>	<b>Carrier</b>	carrier claim #:
address:	address:	bol carrier:
<b>Reason</b>	delivery carrier:	bol date:
claim group:	freight bill pro #:	delivery date:
	invoice #:	freight bill date:
		PO number:
<b>Consignee</b>	<b>Shipper</b>	internal claim #:
address:	address:	in/out:
		trans mode:
acct rec #:	requester name:	vehicle #:
domestic/international: Domestic	recovery amt:	seal#:
document origin:	cost center:	seal intact:
shipped from:	claim responsibility: <input checked="" type="radio"/> Carrier	date requested: 8/9/2009
replacement sold:	<input type="radio"/> Shipper Insurance	date filed: 8/9/2009
invoice amt: 0	<input type="radio"/> Company Insurance	cycle time: 0 days
	<a href="#">additional claim information</a>	updated:

reimburse amt: write-off amt: discount amt: freight amt: add'l charges: total amt: outstanding amt: **Apply**

5. Click the **Company** button. The **Find Company** dialog box opens.

If the Region is incorrect, select a different region from the list. By default, the region you are working in is in the **Find Region** box.

If you would like to see all companies, not just the companies in your list, click to remove the check mark in the **Use My Company** box and click the **Find** button.

6. Select the company responsible for filing the claim from the list and click the **Apply** button to return to the claim form. *This information is required to save a claim.*

If the company does not exist, you can create a new company record by clicking the **Add** button. The **New Company** dialog box opens, allowing you to enter a new Company. Enter the new information and click **Save** to return to the claim form.

7. The Claim Rep's name is automatically populated based on your login. The **Claim Rep** is the person responsible for following up with the carrier. If you are modifying a claim or entering new data, select your name from the list in the **Claim Rep** box. *This information is required to save a claim.*
8. The **Status** box displays the default of **OUTSTANDING**. This should not be changed until the claim is closed. If you selected **This is a Pending Claim** when you created the claim, the **Status** box will have a default status of **Pending**.

9. Click the **Claimant** button. The **Find Claimant** dialog box opens.

The screenshot shows a web browser window titled "MyEZClaim® Find Claimant - Internet Explorer provided by Dell". The address bar shows the URL "http://86.124.36.102/MyEZClaimNet\_2008/Navigation/My%20Account/Pages/Find\_Popup.asp". The dialog box has a title bar "Find Claimant" and three buttons: "Find", "Add", and "Close". Below the title bar, there are several input fields and a checkbox:

- Field to search:** A dropdown menu with "Full Name" selected. Below it, a note says "The '\*' (asterisk) can be used for a wild card search in your criteria."
- Find criteria:** A text input field.
- Max records:** A text input field with "30" entered.
- Find region:** A dropdown menu with "NORTH" selected.
- Use My Claimant:** A checkbox that is currently unchecked. Below it, text says "(Checked = True : Unchecked = False)".

Below these fields, there are two claimant entries, each with an "Apply" button to its right:

- Claimant:** ABC Logistics Inc.  
**Contact:** Anne Smith  
**Address:** 1231 S. A Street  
Corvallis, OR 97623
- Claimant:** Bay Logistics Inc.  
**Contact:** John Larsen  
**Address:** 9356 W. Any Street  
Anyplace, CA 90310

The browser's status bar at the bottom shows "Internet | Protected Mode: On" and a zoom level of "100%".

If the Region is incorrect, select a different region from the list. By default, the region you are working in is in the **Find Region** box.

If you would like to see all claimants, not just the claimants in your list, click to remove the check mark in the **Use My Claimant** box.

10. Select the appropriate business from the **Claimant** list and click the **Apply** button to return to the claim form. ***This information is required to save a claim.***

If the Claimant is not in the list, click the **Add** button. The **New Claimant** dialog box opens, allowing you to enter a new Claimant. Enter the new information and click **Save** to return to the claim form.

11. Click the **Reason** button. The **Find Reason** dialog box opens.

The screenshot shows a web browser window titled "MyEZClaim® Find Reason - Internet Explorer provided by Dell". The address bar shows the URL "http://86.124.36.102/MyEZClaimNet\_2008/Navigation/My%20Account/Pages/Find\_Popup.asp:". The main content area is titled "Find Reason" and contains the following fields and controls:

- Field to search:** A dropdown menu with "Reason Code" selected. Below it, a note states: "The "\*" (asterisk) can be used for a wild card search in your criteria."
- Find criteria:** A text input field.
- Max records:** A text input field with the value "30".
- Use My Reason:** A checkbox that is currently unchecked, with the text "(Checked = True : Unchecked = False)" next to it.
- Reason List:** A scrollable list box containing the following items: Accident, Cancelled Damage, Carton Damage Only, d1, Damage, Delay, dsdasdsad, Freight Charges, Loss - Full, Loss - Partial, Lost Shipment, Missing Skid, and Other (Unknown).
- Buttons:** "Find" and "Close" buttons are at the top right. An "Apply" button is at the bottom center.

The browser's status bar at the bottom shows "Done", "Internet | Protected Mode: On", and a zoom level of "100%".

12. Find the reason that best describes why the claim is being filed from the list and click the **Apply** button. *This information is required to save a claim.*
13. If your company has different groups that handle claims, select your claim group from the **Claim Group** list. If the list is empty, you can skip this step.

14. Click the **Carrier** button. The **Find Carrier** dialog box opens.

MyEZClaim® Find Carrier - Internet Explorer provided by Dell  
http://test2008.myezclaim.com/Navigation/My%20Account/Pages/Find\_Popup.aspx?ShowAd

**Find Carrier** Find Add Close

Field to search: Full Name  
The "\*" (asterisk) can be used for a wild card search in your criteria.

Find criteria:

Max records: 30

Find region: NORTH AMERICA

Use My Carrier ☒ (Checked = True : Unchecked = False)

Carrier: Swift Trucking [SR]  
Contact: Mary Ann Krevh  
Address: 123 Main Street  
Miami, FL 33133  
UNITED STATES

Apply

Done Internet | Protected Mode: On 100%

If the Region is incorrect, select a different region from the list. By default, the region you are working in is in the **Find Region** box.

If you would like to see all carriers, not just the carriers in your list, click to remove the check mark in the **Use My Carriers** box.

15. Select the carrier who was responsible for this shipment from the **Carrier** list and click the **Apply** button to return to the claim form. ***This information is required to save a claim.***

If the Carrier is not in the list, click the **Add** button. The **New Carrier** dialog box opens, allowing you to enter a new Carrier. Enter the new information and click **Save** to return to the claim form.

16. Enter the name of the 3<sup>rd</sup> party delivery carrier, if applicable, in the **Delivery Carrier** box.
17. Enter the freight bill of lading number in the **Freight Bill Pro#** box.
18. Enter the invoice number in the **Invoice #** box.
19. The **Carrier Claim #** is assigned by the carrier and provided when they acknowledge the claim. (See "Updating Claims" for more information.)
20. Enter the carrier's bill-of-lading number in the **BOL Carrier** box. If another claim exists with the same BOL number, you will receive a message indicating that the BOL already exists. You have the option to save the claim with a duplicate BOL number, or return to the claim and modify the number.
21. Enter the date of the bill-of-lading in the **BOL Date** box or click the **Calendar** button and select the date from the calendar.
22. Enter the date on which the delivery was made in the **Delivery Date** box or click the **Calendar** button and select the date from the calendar.



23. Enter the date for the freight bill in the **Freight Bill Date** box or click the **Calendar** button and select the date from the calendar.
24. Enter the purchase order number in the **PO Number** box.
25. Click the **Consignee** button. The **Find Consignee** dialog box opens.

MyEZClaim® Find Consignee - Internet Explorer provided by Dell

http://86.124.36.102/MyEZClaimNet\_2008/Navigation/My%20Account/Pages/Find\_Popup.asp

**Find Consignee** Find Add Close

Field to search: Full Name  
The "\*" (asterisk) can be used for a wild card search in your criteria.

Find criteria:

Max records: 30

Find region: NORTH

Use My Consignee ☐ (Checked = True : Unchecked = False)

---

Consignee: Demo - Customer [CU-001]  
Contact: First LastName  
Address: 123 Main Street  
Cleveland, OH 44110  
UNITED STATES

Apply

---

Consignee: HM Industries  
Contact: HM Industries  
Address: 123 W. Maya Street  
Milwaukee, MN  
53201

Apply

Internet | Protected Mode: On 100%

26. Select the consignee from the **Consignee** list and click the **Apply** button. *This information is required to save a claim.*

If you would like to see all consignees, not just the consignees in your list, click to remove the check mark in the **Use My Consignee** box.

If the consignee is not in the list, click the **Add** button. The **New Consignee** dialog box opens, allowing you to enter a new consignee. Enter the new information and click **Save** to return to the claim form.

27. Click the **Shipper** button. The **Find Shipper** dialog box opens.

The screenshot shows a web browser window titled "MyEZClaim® Find Shipper - Internet Explorer provided by Dell". The address bar shows the URL "http://86.124.36.102/MyEZClaimNet\_2008/Navigation/My%20Account/Pages/Find\_Popup.asp". The dialog box has a title bar "Find Shipper" and three buttons: "Find", "Add", and "Close". Below the title bar, there are several input fields and a checkbox:

- Field to search:** A dropdown menu with "Full Name" selected. Below it, a note says: "The "\*" (asterisk) can be used for a wild card search in your criteria."
- Find criteria:** A text input field.
- Max records:** A text input field with "30" entered.
- Find region:** A dropdown menu with "NORTH" selected.
- Use My Shipper:** A checked checkbox with the text "(Checked = True : Unchecked = False)".

Below these fields, the following information is displayed:

Shipper: Shipper Test-1 [S1]  
Contact:  
Address: 123 Shipper  
Shipper, OH 44092  
UNITED STATES

At the bottom right of the dialog box is an "Apply" button.

If the Region is incorrect, select a different region from the list. By default, the region you are working in is in the **Find Region** box.

28. Select the shipper from the **Shipper** list and click the **Apply** button to return to the claim form. ***This information is required to save a claim.***

If you would like to see all shippers, not just the shippers in your list, click to remove the check mark in the **Use My Shipper** box.

If the Shipper is not in the list, click the **Add** button. The **New Shipper** dialog box opens, allowing you to enter a new Shipper. Enter the new information and click **Save** to return to the claim form.

29. Move to the **Internal Claim #** box and enter the number.
30. Move to the **In/Out** box and select the option that best indicates the shipment type.
31. Move to the **Trans Mode** box and select the method of transportation.
32. Move to the **Acct. Rec #** box and add the A/R ledger number assigned to the claim by accounting for the carrier receivable.
33. Move to the **Domestic/International** box and select the type of shipment. By default, this is set to Domestic. ***This information is required to save a claim.***
34. Move to the **Document Origin** box and enter the origin of the claim documentation.
35. Move to the **Shipped From** box and enter the shipment origination.
36. Move to the **Replacement SOID** and enter the information.
37. Move to the **Invoice Amt** box and enter the amount of the invoice. By default, the amount is "0".

38. Move to the **Requester Name** box and enter the name of the person or organization requesting the claim.
39. Move to the **Recovery Amt** box and enter the anticipated claim recovery.
40. Move to the **Cost Center** box and enter the cost center responsible for the claim.
41. For the **Claim Responsibility**, click on the circle next to the responsible party. By default, this is set to "Carrier".
42. The **Additional Claim Information** link allows you to enter more information for the claim. This link is not active until after the claim is saved.
43. Move to the **Vehicle #** box and enter the number. The vehicle number can be the container or trailer box number.
44. Move to the **Seal #** box and enter the number.
45. Move to the **Seal Intact** box and enter the information.
46. Move to the **Date Requested** box and click the calendar button and select the date. *This information is required to save a claim.*
47. Move to the **Date Filed** box and click the calendar button and select the date filed. *This information is required to save a claim.*
48. The **Cycle Time** box contains the number of days from the date requested to the date filed. The number of days is system generated and cannot be modified. There is no date until the claim is saved.
49. The **Updated** box contains the date the claim was last modified. The date is system generated and cannot be modified. There is no date until the claim is saved.



**NOTE:** Save the claim by clicking the **Save** button. You will not be able to add the Shipping Products, Credit/Debit, Documents, Activities, Diary, or Payments until the claim is saved.

Continue with the following steps to enter any required information in the **Shipping Products**, **Add'l Charges**, **Credit/Debit**, **Documents**, **Activities** and **Diary** tabs.

## SHIPPING PRODUCTS TAB

The **Shipping Products** tab contains all of the product information related to this claim. There are three different ways to add product information to the claim. You can use the **Add Product** button, **Paste Products** button, or the **Multiple Products** button.

### Using the Add Product Button

1. From the Claim Properties page, select the **Shipping Products** tab.

- Click the **Add Product** button to add a new product to the claim. The **New Product** dialog box and the **Find Product** dialog opens.

MyEZClaim® Find product - Internet Explorer provided by Dell

dlBusinessGroup,ddlProductLine,txtSubProduct&OutputFields=0,1,1,2,3,4,5,6&ShowAdd=true

**Find product** Find Add Close

Field to search: Product Id  
The "\*" (asterisk) can be used for a wild card search in your criteria.

Find criteria:

Max records: 30

Use My product ☐ (Checked = True : Unchecked = False)

Angel Hair Pasta [23237g]  
Atlantic Salmon [2346346]  
Chicken nuggets [70907]  
Chicken Sandwich [373]  
Chocolate cupcakes [123-456]  
Codfish Fillets - Case [67554-A5656]  
Juice, Apple 100% [6477921]  
Juice, Cranberry Cocktail 15% [0515791]  
Juice, Fruit Blend 100% [1477942]  
Juice, Grape 100% [1477934]  
Juice, Orange 100% [0515817]  
Juice, Prune 100% Cup [0511618]  
Mid Section Support Beam [C7507A]

Done Internet | Protected Mode: On 100%

- From the **Product** list, double-click the product for which the claim is being issued. The product's price and weight are copied into the **Price** and **Weight** boxes, respectively.  
If you would like to see all products, not just the products in your list, click to remove the check mark in the **Use My Product** box.  
If the Product is not in the list, click the **Add** button. The **New Product** dialog box opens, allowing you to enter a new product. Enter the new information and click **Save** to return to the claim.  
(See "Adding a Product to the Product List" for more information.)
- In the **Quantity** box enter the quantity of the product involved in the claim.
- If the unit price is different from that shown in the **Price** box, enter the correct price.
- If the weight is different from that shown in the **Weight** box, enter the correct weight for a single unit/case of the selected product. If you are using the Release Value method for the line item calculation you must enter a weight.
- Move to the **Sub Product** box and enter any additional product information.
- Move to the **Receiving Doc ID** box and enter the doc ID.
- Move to the **Merchandise ID** box and enter the ID.
- In the **Shipped** and **Received** boxes, enter the information.
- In the **Import (Y/N)** box, select whether or not the product was an import.
- By default, the reason code matches the reason code selected for the claim. If this is not correct, select a reason code from the **Reason Code** list.

13. Move to the **Serial Number** box and enter the serial number.
14. Move to the **Invoice Number** and enter the invoice number.
15. Move to the **Sales Order Number** box and enter the sales order number.
16. The **Business Group** and **Product Line** default to what is configured on the Product. If this information is not correct, select the business group and product line from the list.



**NOTE:** You can calculate the line item total using either the Product Disposition method or the Release Value method.

▣ **Product Disposition Method**

By default, the Disposition Method is calculated as (Quantity \* Price) \* Disposition Percentage. The disposition method can be calculated as (Price \* Weight) \* Disposition Percentage by checking the **Catch Wt. Calc.** check box under the **Weight** box.

- a) Select the **Disposition** option. The **Disposition** list is enabled.
- b) Select the appropriate product disposition and discount from the **Disposition** list.

If you need a disposition that is not in the list, you need to close the **New Product** dialog box – you must enter a quantity if you want the product information to be saved with the claim.

- c) If the disposition discount needs to be modified, move to the **Percent** box and enter a new percent discount. A line-item total is displayed in the **Line Total** box. This is the product of the **Quantity** and the **Price**, less the discount (either from the **Disposition** or the **Percentage** box).

▣ **Release Value Method**

- a) Select the **Release** option. The **Release** list is enabled.
- b) Select the appropriate release value and rate from the **Release** list.

If you need a release value that is not in the list, you need to close the **New Product** dialog box – you must enter a quantity if you want the product information to be saved with the claim.

- c) If the release value rate needs to be modified, move to the **Release Value** box and enter a new release value. A new **Line Total** is calculated. This is the product of the **Quantity** and **Weight** and **Release Value**.

17. If you have multiple products to add, click **Save & Add New** to keep adding products. If this is the last product to be added to the claim, click the **Save** button to return to the Claim Properties window.
18. If there are any applicable discounts, enter the value in the **Discount Amt** box.
19. Enter any applicable freight charges in the **Freight Amt** box.
20. If there are any other applicable charges to include on the claim form, enter the charges on the **Add'l Charges** tab. These charges will be totaled in the **add'l charges** box. The Add'l Amt is for display only, you cannot manually modify this value.
21. The **Total Amt** is calculated based on the products listed, minus any values listed in the **Reimbursement Amt**, **Write-Off Amt**, and **Discount Amt** boxes. The Total Amt also adds any charges added in the Freight Amt and Add'l Charges boxes. The **Total Amt** box is for display only, you cannot manually modify this value.

The **Outstanding Amt** is calculated by the **Total Amt** minus any payments made. The Outstanding Amt is for display only, you cannot manually modify this value.

The currency is shown in USD. To change the currency, click the **Globe** icon and select a different currency.



**NOTE:** Any additions or changes to the Shipping Products information are NOT cancelled by clicking the Cancel button in the Claim Properties window (this does not include the Reimbursement Amt, Write-Off Amt, Discount Amt, Freight Amt, and Other Amt). You must manually undo any modifications you've made in this section.

### Using the Paste Products Button

The **Paste Products** button is available to allow SAP users to copy product information from your SAP screen and paste the part number and Quantity to the products screen. From the Claim Properties page, click the **Paste Products** button. The **Copy & Paste Products** dialog box opens. You can copy the products from the SAP screen (only the part number and quantity) and paste to the screen. Edit the screen for the correct part number and quantity.

### Using the Multiple Products Button

The **Multiple Products** button is available to allow you to add multiple products all at once. You can copy and paste the information from another screen or just type in the information. From the Claim Properties page, click the **Multiple Add'l Charges Tab**



**NOTE:** When using the **Multiple Products** to input your products for the claim, the **Reason Code** does not default to the selected Reason code for the claim.

### ADD'L CHARGES TAB

The **Add'l Charges** tab contains information regarding additional charges associated with the claim. From here you can enter any additional charges associated with the claim such as restocking fees.

1. From the Claim Properties window, select the **Add'l Charges** tab.

2. Click the **Add Charges** button. The **New Additional Charge** dialog box opens.

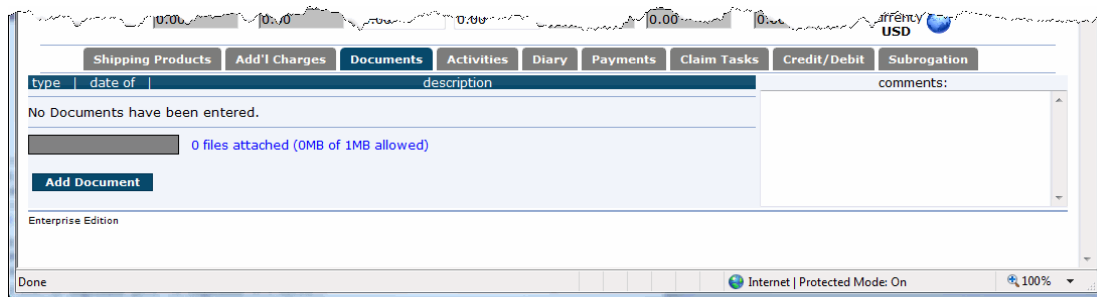
3. Select the **Charge Type** from the list.
4. Move to the **Amount** box and enter the charge amount.
5. If you have more charges to enter, click the **Save & Add New** button. This will save the charge to the claim and open another New Additional Charge dialog box.

If you have no more charges to enter, click the **Save** button to return to the claim.

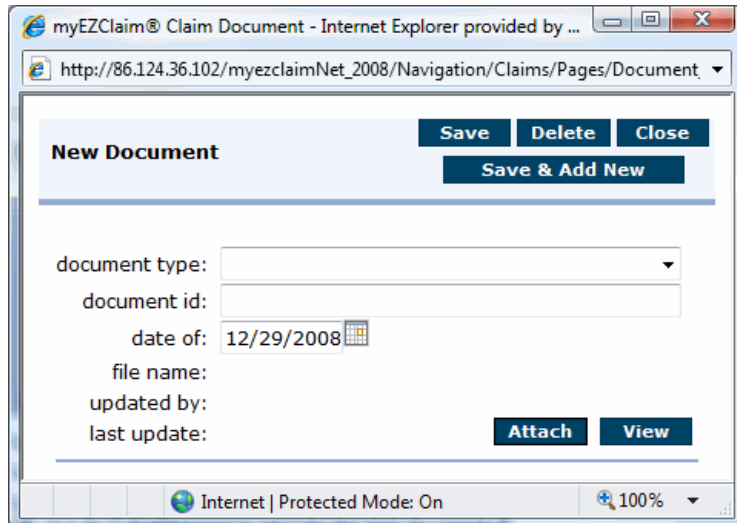
## DOCUMENTS TAB

The **Documents** tab contains information regarding the documentation associated with the claim. From here you can enter the claimant reference numbers, inspection reports, etc. You also have the ability to attach documents to the claims from here.

1. From the Claim Properties window, select the **Documents** tab.

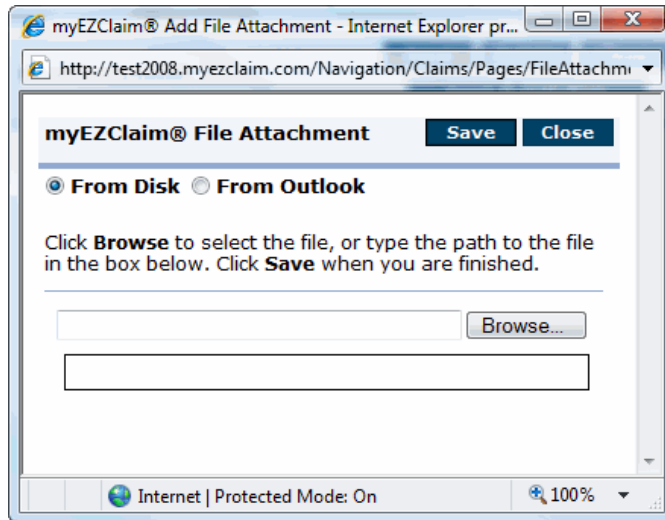


2. Click the **Add Document** button. The **New Document** dialog box opens.



3. Select the **Document Type** from the list.
4. Move to the **Document ID** box and enter the document ID.
5. Move to the **Date Of** box. If the date is not correct, you can enter a new date.  
OR click the **Calendar** button to select the date from the calendar.
6. Click the **Save** button when you are done. If you are not going to attach a document, click the **Close** button to return to the claim.

- Click the **Attach** button to attach the document to the claim if applicable. The **File Attachment** dialog box opens.



- You can attach files by using the **From Disk** or **From Outlook** options.  
If you are attaching **From Disk**,
  - Click the **Browse** button. The **Choose File** dialog box opens.
  - Locate and select the document you want to attach to the claim.
  - Click the **Open** button to return to the **File Attachment** dialog box.
  - Click the **Save** button to return to the **New Document Dialog** box.  
If you are attaching **From Outlook**,
  - Select the **From Outlook** radio button
  - Click the **Get Emails** button.
  - Locate and select the email document you want to attach to the claim.
  - Click the **Save** button to return to the **New Document Dialog** box.



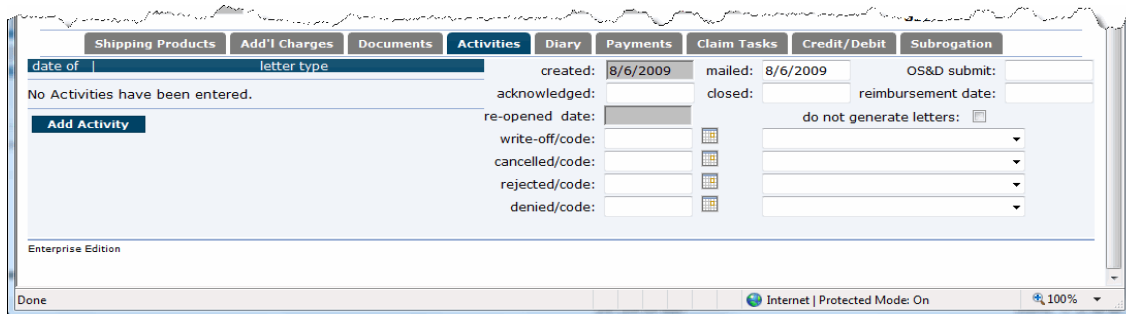
**NOTE:** Any comments entered in the Comments box will be printed on the claim form.

## ACTIVITIES TAB

The **Activities** tab contains information that helps you track the status of the claim.

If you have contacted the carrier to inform them of your intent to file a claim, you should add the Notice of Intent.

- From the Claim Properties window, select the **Activities** tab.





2. Click the **Add Activity** button. The **New Activity** dialog box opens.

3. From the **Activity Type** list, select **Notice of Intent Filed**.
4. Move to the **Date Of** box. If the date is not correct, you can enter a new date.  
OR click the **Calendar** button next to select the date from the calendar.

The **Created By** box shows the person who last created or modified the activity. It is for display only, you cannot manually modify it.

The **Date Created** box shows the date of when the activity was created or last modified. It is for display only, you cannot manually modify it.

5. Click the **Save** button

Generally, you won't enter any other information in the **Activities** tab when first entering a claim. This information is entered when updating a claim. Some of the boxes in this tab are automatically updated. When the claim is created, the **Created Date** is filled with the current date. When you update a claim, the **Last Update** box is filled with the current date.



**NOTE:** Any changes made in Shipping Products, Add'l Charges, Credit/Debit, Documents, Activities, Diary, or Payments are NOT cancelled by clicking the Cancel button. You must manually undo any changes you've made in these sections.

## DIARY TAB

The **Diary** tab is used to add diary notes that help you keep track of the events associated with the claim.

1. From the Claim Properties window, select the **Diary** tab.

2. Click the **Add Diary** button to add a new diary note. The **New Diary Entry** dialog box opens.

myEZClaim® Claim Diary Properties - Internet Explorer provid...

http://86.124.36.102/myezclaimNet\_2008/Navigation/Claims/Pages/ClaimDia

**New Diary Entry** **Save** **Delete** **Close**

date of: 12/30/2008

category: General

comments:

updated by:

last update:

Internet | Protected Mode: On 100%

3. If you want to change the date, enter a new date in the **Date Of** box.  
OR click the **Calendar** button and select the date from the calendar.
  4. Select the type of diary entry from the **Category** drop-down list.
  5. Enter the comments you want to be saved with this claim.
  6. Click the **Save** button to return to the claim form. OR, click the **Close** button to not save the comments.
- You can delete a diary note by selecting the note and clicking the **Delete** button.



**NOTE:** You can print the *Claims with Diary* report by clicking the **Print** button.

## CREDIT/DEBIT TAB

The credit/debit tab contains information regarding documentation associated with the claim. This internal document can be printed for submission to any department, such as accounting, transportation, etc. and contains a hierarchy of approval authority levels for sign-off. Information placed on these documents will not appear on the claim form.

1. From the Claim Properties window, select the **Credit/Debit** tab.

Shipping Products Add'l Charges Documents Activities Diary Payments Claim Tasks **Credit/Debit** Subrogation

memo type: memo number: memo date:

memo bill-to/ship-to: Carrier

**Print**

Enterprise Edition

Done Internet | Protected Mode: On 100%

2. Go to the **Memo Type** box and select either Credit or Debit.
3. Move to the **Memo Number** box and enter the memo number.
4. Go to the **Memo Date** and use the calendar button to select the date.
5. Go to the **Memo Bill-To/Ship-To** box and enter the relevant information.
6. Click the **Print** button. The Credit or Debit memo form will appear in a PDF file for printing. Save or print the form. Close the screen to return to the Claim Properties window.

### PAYMENTS TAB

The **Payments** tab is used to keep track of payments received against the claim.

Generally, you won't enter any other information in the **Payments** tab when first entering a claim. This information is entered when updating a claim.

### CLAIMS TASKS TAB

The **Claim Tasks** tab is used to keep track of tasks for the claim.

Generally, you won't enter any information in this tab when first entering a claim. This information is entered when updating a claim.

### SUBROGATION TAB

The **Subrogation** tab is used to keep track of payments made for the claim.

Generally, you won't enter any information in the **Subrogation** tab when first entering a claim. This information is entered when updating a claim.

## ENTERING OVERCHARGE CLAIMS

When you enter claims you can automatically generate claim forms and follow-up letters. The information you enter for the claim is used when you generate the claim form and follow-up letters.

1. Click the **Claims** group tab. The Outstanding Claims page opens. You can sort the claims by selecting Claim Number, Carriers, Delivery Date, Reason, Consignee, BOL Date, Shipper, or Last Update from the drop-down list and then clicking the **Apply** button.

2. Click the **New Claim** button. The **Create a New Claim** dialog box opens.

myEZClaim® Create Claim - Internet Explorer provided ...

http://86.124.36.102/myezclaimNet\_2008/Navigation/Claims/Pages/Cre

**Create a New Claim** **Apply** **Close**

select the claim type:

☒ loss and damage ☐ overcharge

☐ return authorization ☐ vendor

this is a Pending claim:

☐ (Checked = True : Unchecked = False)

select the claim number: (optional)

☒ system generated claim prefix: LD

☐ user assigned

Internet | Protected Mode: On 100%

3. Select the **Overcharge** option.
4. Accept the **System Generated** claim number or, select **User Assigned** and enter your claim number.



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**NOTE:** The Claim Number is not assigned until the claim is saved.

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5. Click the **Apply** button. The claim window opens.

6. Click the **Company** button. The **Find Company** dialog box opens.

Select the company responsible for filing the claim from the list and click the **Apply** button.

If you would like to see all companies, not just the companies in your list, click to remove the check mark in the **Use My Company** box and click the **Find** button.

If the company does not exist, you can create a new company record by clicking the **Add** button. *This information is required to save a claim.*

7. The Claim Rep's name is automatically populated based on your login. The **Claim Rep** is the person responsible for following up with the carrier. If you are modifying a claim or entering new data, select your name from the list in the **Claim Rep** box. *This information is required to save a claim.*
8. The **Status** box displays the default of **OUTSTANDING**.



**NOTE:** If you selected **This is a Pending Claim** when you created the claim, the **Status** box will have a default status of **Pending**.

9. Click the **Claimant** button. The **Find Claimant** dialog box opens.

10. Select the appropriate business from the **Claimant** list and click the **Apply** button. *This information is required to save a claim.*

If you would like to see all claimants, not just the claimants in your list, click to remove the check mark in the **Use My Claimant** box.

If the Claimant is not in the list, click the **Add** button. The **New Claimant** dialog box opens, allowing you to enter a new Claimant. Enter the new information and click **Save**.

11. Click the **Reason** button. The **Find Reason** dialog box opens.

The screenshot shows a web browser window titled "MyEZClaim® Find Reason - Internet Explorer provided by Dell". The address bar shows the URL: [http://86.124.36.102/MyEZClaimNet\\_2008/Navigation/My%20Account/Pages/Find\\_Popup.asp](http://86.124.36.102/MyEZClaimNet_2008/Navigation/My%20Account/Pages/Find_Popup.asp). The dialog box has a title bar "Find Reason" with "Find" and "Close" buttons. Below the title bar, there is a "Field to search:" dropdown menu set to "Reason Code". A note states: "The '\*' (asterisk) can be used for a wild card search in your criteria." Below this is a "Find criteria:" text input field. The "Max records:" is set to "30". There is a checkbox for "Use My Reason" which is unchecked, with a note "(Checked = True : Unchecked = False)". A list box contains the following items: Accident, Cancelled Damage, Carton Damage Only, d1, Damage, Delay, dsdasdsad, Freight Charges, Loss - Full, Loss - Partial, Lost Shipment, Missing Skid, and Other (Unknown). At the bottom of the dialog box is an "Apply" button. The browser's status bar shows "Done", "Internet | Protected Mode: On", and a zoom level of "100%".

Double-click the reason that best describes why the claim is being filed from the list. *This information is required to save a claim.*

12. If your company has different groups that handle claims, select your claim group from the **Claim Group** list. If the list is empty, you can skip this step.

13. Click the **Carrier** button. The **Find Carrier** dialog box opens.

MyEZClaim® Find Carrier - Internet Explorer provided by Dell

http://test2008.myezclaim.com/Navigation/My%20Account/Pages/Find\_Popup.aspx?ShowAd

**Find Carrier** Find Add Close

Field to search: Full Name

The "\*" (asterisk) can be used for a wild card search in your criteria.

Find criteria:

Max records: 30

Find region: NORTH AMERICA

Use My Carrier ☒ (Checked = True : Unchecked = False)

Carrier: Swift Trucking [SR]  
Contact: Mary Ann Krevh  
Address: 123 Main Street  
Miami, FL 33133  
UNITED STATES

Apply

Done Internet | Protected Mode: On 100%

Select the carrier who was responsible for this shipment from the **Carrier** list and click the **Apply** button. *This information is required to save a claim.*

If you would like to see all carriers, not just the carriers in your list, click to remove the check mark in the **Use My Carrier** box.

If the Carrier is not in the list, click the **Add** button. The **New Carrier** dialog box opens, allowing you to enter a new Carrier. Enter the new information and click **Save** to return to the claim form.

14. Enter the name of the 3<sup>rd</sup> party delivery carrier, if applicable, in the **Delivery Carrier** box.
15. The **Carrier Claim #** is assigned by the carrier and provided when they acknowledge the claim. (See "Updating Claims" for more information.)
16. Enter the carrier's bill-of-lading number in the **BOL Carrier** box. If another claim exists with the same BOL number, you will receive a message indicating that the BOL already exists. You have the option to save the claim with a duplicate BOL number, or return to the claim and modify the number.
17. Enter the date of the bill-of-lading in the **BOL Date** box.
18. Enter the date on which the delivery was made, in the **Delivery Date** box.



19. Click the **Consignee** button. The **Find Consignee** dialog box opens.

MyEZClaim® Find Consignee - Internet Explorer provided by Dell

http://86.124.36.102/MyEZClaimNet\_2008/Navigation/My%20Account/Pages/Find\_Popup.asp

**Find Consignee** Find Add Close

Field to search: Full Name  
The "\*" (asterisk) can be used for a wild card search in your criteria.

Find criteria:

Max records: 30

Find region: NORTH

Use My Consignee ☐ (Checked = True : Unchecked = False)

Consignee: Demo - Customer [CU-001]  
Contact: First LastName  
Address: 123 Main Street  
Cleveland, OH 44110  
UNITED STATES  
Apply

Consignee: HM Industries  
Contact: HM Industries  
Address: 123 W. Maya Street  
Milwaukee, MN  
53201  
Apply

Internet | Protected Mode: On 100%

Select the consignee from the **Consignee** list and click the **Apply** button. *This information is required to save a claim.*

If you would like to see all consignees, not just the consignees in your list, click to remove the check mark in the **Use My Consignee** box.

If the consignee is not in the list, click the **Add** button. The **New Consignee** dialog box opens, allowing you to enter a new consignee. Enter the new information and click **Save** to return to the claim form.

20. Click the **Shipper** button. The **Find Shipper** dialog box opens.

Select the shipper from the **Shipper** list and click the **Apply** button. *This information is required to save a claim.*

If you would like to see all shippers, not just the shippers in your list, click to remove the check mark in the **Use My Shipper** box.

If the Shipper is not in the list, click the **Add** button. The **New Shipper** dialog box opens, allowing you to enter a new Shipper. Enter the new information and click **Save** to return to the claim form.

21. Move to the **Internal Claim #** box and enter the number.
22. Move to the **In/Out** box and select the option that best indicates the shipment type.
23. Move to the **Trans Mode** box and select the method of transportation.
24. Move to the **Acct. Rec #** box and add the A/R ledger number assigned to the claim by accounting for the carrier receivable.
25. Move to the **Domestic/International** box and select the type of shipment. By default, this is set to Domestic. *This information is required to save a claim.*
26. Move to the **Document Origin** box and enter the origin of the claim documentation.
27. The **Additional Claim Information** link allows you to enter more information for the claim. This link is not active until after the claim is saved.
28. Move to the **Requester Name** box and enter the name of the person or organization requesting the claim.
29. Move to the **Recovery Amt** box and enter the anticipated claim recovery.
30. Move to the **Cost Center** box and enter the cost center responsible for the claim.

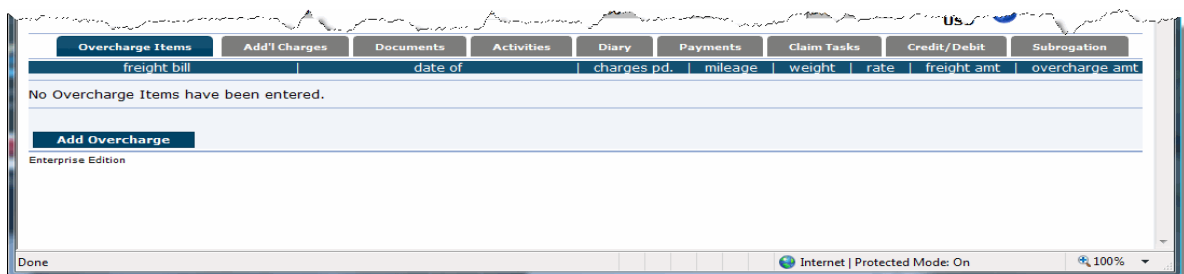
31. Move to the **Vehicle #** box and enter the number. The vehicle number can be the container or trailer box number.
32. Move to the **Seal #** box and enter the number.
33. Move to the **Seal Intact** box and enter the information.
34. Move to the **Date Requested** box and click the calendar button and select the date. *This information is required to save a claim.*
35. Move to the **Date Filed** box and click the calendar button and select the date filed. *This information is required to save a claim.*
36. The **Cycle Time** box contains the number of days from the date requested to the date filed. The number of days is system generated and cannot be modified. There is no date until the claim is saved.
37. The **Updated** box contains the date the claim was last modified. The date is system generated and cannot be modified. There is no date until the claim is saved.
38. Move to the **Shipped From** box. If the shipment was made from a location other than that shown for the **Shipper**, enter the address from which the shipment was actually made.
39. In the **Origin** box, enter the place where the shipment originated.
40. In the **Destination** box, enter the shipment's ultimate destination.
41. In the **Tariff Authority** box enter any tariffs that were agreed to by the carrier and the shipper.
42. Click the **Save** button. You must click **Save** before you can enter any information in the **Overcharge Items**, **Add'l Charges**, **Documents**, **Activities**, **Diary**, or **Payments**.

Continue with the following steps to enter any required information in the **Overcharge Items**, **Add'l Charges**, **Documents**, **Activities**, **Diary**, or **Payments** tabs.

## OVERCHARGE ITEMS TAB

The **Overcharge Items** tab is used to track freight bills related to the claim being entered.

1. Select the **Overcharge Items** tab.



- Click the **Add Overcharge** button. The **New Overcharge** dialog box opens.

- In the **Freight Bill** box, enter the freight bill number for which there was an overcharge. *This information is required.*
- In the **Date Of** box, enter the date of the freight bill or click on the calendar button and select the date. *This information is required.*
- In the **Paid Amount** box, enter the amount paid against the freight bill.
- In the **Check Number** box, enter the number of the check.
- In the **Check Date** box, enter the date of the check.



**NOTE:** If the Overcharge was based on mileage or the weight of the shipment, use the Overcharge Calculation area to calculate the actual Freight Amount. Otherwise, enter the actual freight cost in the Freight Amount box.

- Move to the **Line Calculation Method** area. If this overcharge was based on mileage, enter the mileage in the **Mileage** box. Or, if this overcharge was based on weight, enter the weight in the **Weight** box.
- Move to the **Rate** box and enter the appropriate rate (whether for **Mileage** or **Weight**). If the overcharge was based on weight, the 100 Weight calculation method is used. The **Rate** is divided by the product of the **Weight** and **100**.
- The actual **Freight Amount** is calculated based on the information entered in the **Overcharge Calculation** area. If the **Freight Amount** is not correct, correct the amount shown. The **Freight Amount** is then subtracted from the **Paid Amount** and the resulting figure is placed in the **Overcharge** box. The **Overcharge** value cannot be manually modified. This is the value that is used for the Overcharge Claim Form, in addition to any other Overcharge items on the claim.

The **Updated By** box shows the person who last created or modified the overcharge. It is for display only, you cannot manually modify it.

The **Last Update** box shows the date of when the overcharge was created or last modified. It is for display only, you cannot manually modify it.

11. Click the **Save** button to return to the **Overcharge Items** tab.
12. If there are any applicable discounts, enter the value in the **Discount Amt** box.
13. Enter any applicable freight charges in the **Freight Amt** box.
14. If there are any other applicable charges to include on the claim form, enter the values on the **Add'l Charges** tab.
15. The **Total Amt** is calculated based on the products listed, minus any values listed in the **Reimbursement Amt**, **Write-Off Amt**, and **Discount Amt** boxes. The Total Amt also adds any charges in the Freight Amt and Add'l Charges boxes. The **Total Amt** box is for display only, you cannot manually modify this value.
16. The **Outstanding Amt** is calculated by the **Total Amt** minus any payments made. The **Outstanding Amt** is for display only, you cannot manually modify this value.



**NOTE:** Any additions or changes to the Overcharge Items information are NOT cancelled by clicking the Cancel button in the Claim Properties window (this does not include the Reimbursement Amt, Write-Off Amt, Discount Amt, Freight Amt, and Other Amt). You must manually undo any modifications you've made in this section.

## ADD'L CHARGES TAB

The **Add'l Charges** tab contains information regarding additional charges associated with the claim. From here you can enter any additional charges associated with the claim such as restocking fees.

1. From the Claim Properties window, select the **Add'l Charges** tab.

- Click the **Add Charges** button. The **New Additional Charge** dialog box opens.

- Select the **Charge Type** from the list.
- Move to the **Amount** box and enter the charge amount.
- If you have more charges to enter, click the **Save & Add New** button. This will save the charge to the claim and open another New Additional Charge dialog box.

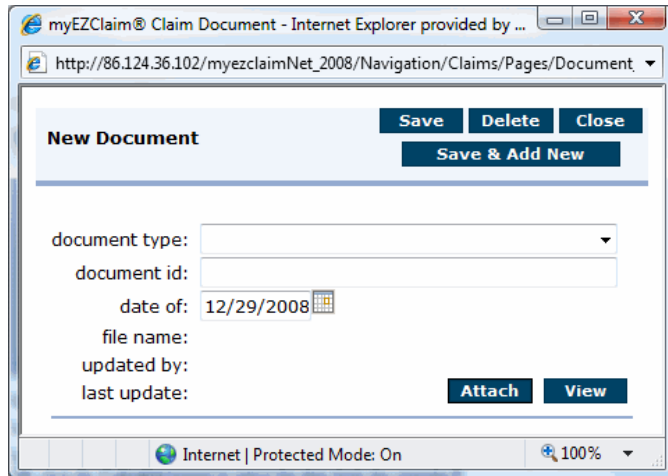
If you have no more charges to enter, click the **Save** button to return to the claim.

## DOCUMENTS TAB

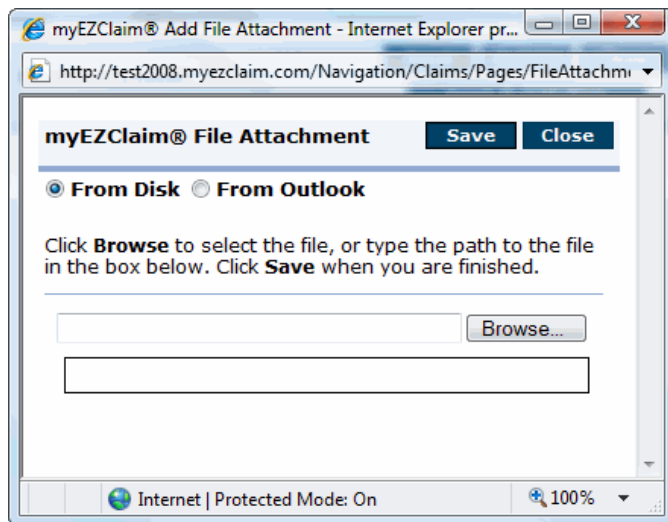
The **Documents** tab contains information regarding the documentation associated with the claim.

- From the Claim Properties window, select the **Documents** tab.

2. Click the **Add** button. The **New Document** dialog box opens.



3. Select the **Document Type** from the list.
4. Move to the **Document ID** box and enter the document ID.
5. Move to the **Date Of** box. If the date is not correct, you can enter a new date.  
OR click the **Calendar** button to select the date from the calendar.
6. Click the **Save** button when you are done. If you are not going to attach a document, click the **Close** button to return to the claim.
7. Click the **Attach** button to attach the document to the claim if applicable. The **File Attachment** dialog box opens.



8. You can attach files by using the **From Disk** or **From Outlook** options.  
If you are attaching **From Disk**,
  - Click the **Browse** button. The **Choose File** dialog box opens.
  - Locate and select the document you want to attach to the claim.
  - Click the **Open** button to return to the **File Attachment** dialog box.
  - Click the **Save** button to return to the **New Document Dialog** box.

If you are attaching **From Outlook**,

- Select the **From Outlook** radio button
- Click the **Get Emails** button.
- Locate and select the email document you want to attach to the claim.
- Click the **Save** button to return to the **New Document Dialog** box.



**NOTE:** Any comments entered in the Comments box will be printed on the claim form.

## ACTIVITIES TAB

The **Activities** tab contains information that helps you track the status of the claim.

If you have contacted the carrier to inform them of your intent to file a claim, you should add the Notice of Intent.

1. From the Claim Properties window, select the **Documents** tab.

2. Click the **Add Activity** button. The **New Activity** dialog box opens.

3. From the **Activity Type** list, select **Notice of Intent Filed**.
4. Move to the **Date Of** box. If the date is not correct, you can enter a new date.  
OR click the **Calendar** button next to select the date from the calendar.

The **Created By** box shows the person who last created or modified the activity. It is for display only, you cannot manually modify it.

The **Date Created** box shows the date of when the activity was created or last modified. It is for display only, you cannot manually modify it.

5. Click the **Save** button



Generally, you won't enter any other information in the **Activities** tab when first entering a claim. This information is entered when updating a claim. Some of the boxes in this tab are automatically updated. When the claim is created, the **Created Date** is filled with the current date. When you update a claim, the **Last Update** box is filled with the current date.



**NOTE:** Any changes made in Shipping Products, Credit/Debit, Documents, Activities, Diary, or Payments are NOT cancelled by clicking the Cancel button. You must manually undo any changes you've made in these sections.

## DIARY TAB

The **Diary** tab is used to add diary notes that help you keep track of the events associated with the claim.

1. Select the **Diary** tab.

2. Click the **Add Diary** button to add a new diary note. The **New Diary Entry** dialog box opens.

3. If you want to change the date, enter a new date in the **Date Of** box.  
OR click the **Calendar** button and select the date from the calendar.
4. Enter the comments you want to be saved with this claim.
5. Click the **Save** button to return to the claim form. OR, click the **Close** button to not save the comments.

You can delete a diary note by selecting the note and clicking the **Delete** button.



**NOTE:** You can print the *Claims with Diary* report by clicking the **Print** button.

### CREDIT/DEBIT TAB

The credit/debit tab contains information regarding documentation associated with the claim. This internal document can be printed for submission to any department, such as accounting, transportation, etc. and contains a hierarchy of approval authority levels for sign-off. Information placed on these documents will not appear on the claim form.

1. From the Claim Properties window, select the **Credit/Debit** tab.

2. Go to the **Memo Type** box and select either Credit or Debit.
3. Move to the **Memo Number** box and enter the memo number.
4. Go to the **Memo Date** and use the calendar button to select the date.
5. Go to the **Memo Bill-To/Ship-To** box and enter the relevant information.
6. Click the **Print** button at the bottom. The Credit or Debit memo form will appear in a PDF file for printing. Save or print the form. Close the screen to return to the Claim Properties window.

### PAYMENTS TAB

The **Payments** tab is used to keep track of payments received against the claim.

Generally, you won't enter any other information in the **Payments** tab when first entering a claim. This information is entered when updating a claim.

### CLAIMS TASKS TAB

The **Claim Tasks** tab is used to keep track of tasks for the claim.

Generally, you won't enter any information in this tab when first entering a claim. This information is entered when updating a claim.

### SUBROGATION TAB

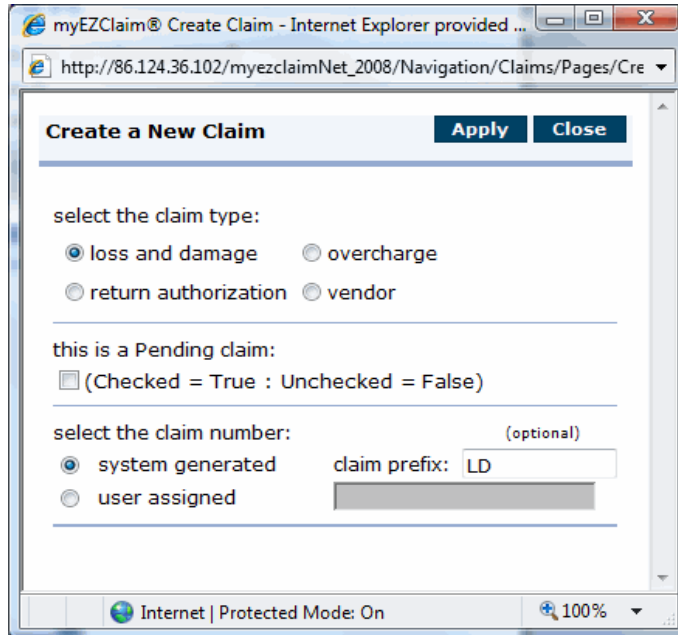
The **Subrogation** tab is used to keep track of payments made for the claim.

Generally, you won't enter any information in the **Subrogation** tab when first entering a claim. This information is entered when updating a claim.

## ENTERING VENDOR CLAIMS

The information you enter for a claim is used when you generate the claim form and follow-up letters.

1. Click the **Claims** group tab. The Show Outstanding Claims page opens.
2. Click the **New Claim** button. The **Create a New Claim** dialog box opens.



3. Select the **Vendor** option.
4. If this is a pending claim, select the check box for **This is a Pending Claim**.
5. Accept the **System Generated** claim number *or* select **User Assigned** and enter your claim number.



**NOTE:** The Claim Number is not assigned until the claim is saved.

## PROCESSING CLAIMS

### Entering Vendor Claims

6. Click the **Apply** button. The vendor claim window opens.

myEZClaim® Vendor Claim Properties - Internet Explorer provided by Dell

http://test2008.myezclaim.com/Navigation/Claims/Pages/VendorClaim\_Popup.aspx?claimType=8&numberType=1&claimNumber=VC&isPODClaim=False

Vendor Claim Number: (pending) **Delete** **Save** **Print** **Email** **Reassign** **Reverse** **Convert** **Close**

**Company** claim rep: Jane Demo status: Outstanding

**Claimant** address:

**Vendor** address: vendor claim #: bol carrier: bol date: delivery date: PO number:

**Reason** claim group: vendor number: delivery carrier: buyer code: invoice #: internal claim#: in/out: trans mode:

**Consignee** address:

**Shipper** address:

acct rec #: requester name: vehicle #: domestic/international: Domestic recovery amt: seal #: document origin: cost center: seal intact: shipped from: claim responsibility: Carrier date requested: 8/10/2009 replacement sold: Shipper Insurance date filled: 8/10/2009 invoice amt: 0 Company Insurance cycle time: 0 days updated: additional claim information

reimburse amt: write-off amt: discount amt: freight amt: add'l charges: total amt: outstanding amt: **Apply**

7. Click the **Company** button. The **Find Company** dialog box opens.

MyEZClaim® Find Company - Internet Explorer provided by Dell

http://test2008.myezclaim.com/Navigation/My%20Account/Pages/Find\_Popup.aspx?ShowAd

**Find Company** **Find** **Add** **Close**

Field to search: Full Name The "\*" (asterisk) can be used for a wild card search in your criteria.

Find criteria:

Max records: 30

Find region: NORTH AMERICA

Use My Company ☒ (Checked = True : Unchecked = False)

Company: MG Corporation [MG1234]  
Contact: Mike Gard  
Address: 123 Main St  
Willoughby Hills, OH 44120  
UNITED STATES **Apply**

Done Internet | Protected Mode: On 100%

If the Region is incorrect, select a different region from the list. By default, the region you are working in is in the **Find Region** box.

If you would like to see all companies, not just the companies in your list, click to remove the check mark in the **Use My Company** box and click the **Find** button.

Select the company responsible for filing the claim from the list and click the **Apply** button to return to the claim form. **This information is required to save a claim.**

If the company does not exist, you can create a new company record by clicking the **Add** button. The **New Company** dialog box opens, allowing you to enter a new Company. Enter the new information and click **Save** to return to the claim form.

8. The Claim Rep's name is automatically populated based on your login. The **Claim Rep** is the person responsible for following up with the carrier. If you are modifying a claim or entering new data, select your name from the list in the **Claim Rep** box. **This information is required to save a claim.**
9. The **Status** box displays the default of **OUTSTANDING**. This should not be changed until the claim is closed. If you selected **This is a Pending Claim** when you created the claim, the **Status** box will have a default status of **Pending**.
10. Click the **Claimant** button. The **Find Claimant** dialog box opens.

MyEZClaim® Find Claimant - Internet Explorer provided by Dell

http://86.124.36.102/MyEZClaimNet\_2008/Navigation/My%20Account/Pages/Find\_Popup.asp

**Find Claimant** Find Add Close

Field to search: Full Name  
The "\*" (asterisk) can be used for a wild card search in your criteria.

Find criteria:

Max records: 30

Find region: NORTH

Use My Claimant ☐ (Checked = True : Unchecked = False)

---

Claimant: ABC Logistics Inc.  
Contact: Anne Smith  
Address: 1231 S. A Street  
Corvallis, OR 97623

Apply

---

Claimant: Bay Logistics Inc.  
Contact: John Larsen  
Address: 9356 W. Any Street  
Anyplace, CA 90310

Apply

Internet | Protected Mode: On 100%

If the Region is incorrect, select a different region from the list. By default, the region you are working in is in the **Find Region** box.

If you would like to see all claimants, not just the claimants in your list, click to remove the check mark in the **Use My Claimant** box.

Select the appropriate business from the **Claimant** list and click the **Apply** button to return to the claim form. ***This information is required to save a claim.***

If the Claimant is not in the list, click the **Add** button. The **New Claimant** dialog box opens, allowing you to enter a new Claimant. Enter the new information and click **Save** to return to the claim form.

11. Click the **Reason** button. The **Find Reason** dialog box opens.

12. Find the reason that best describes why the claim is being filed from the list and click the **Apply** button. ***This information is required to save a claim.***
13. If your company has different groups that handle claims, select your claim group from the **Claim Group** list. If the list is empty, you can skip this step.

14. Click the **Vendor** button. The **Find Shipper** dialog box opens.

If the Region is incorrect, select a different region from the list. By default, the region you are working in is in the **Find Region** box.

Select the vendor from the **Shipper** list and click the **Apply** button to return to the claim form. ***This information is required to save a claim.***

If you would like to see all shippers, not just the shippers in your list, click to remove the check mark in the **Use My Shipper** box.

If the vendor is not in the list, click the **Add** button. The **New Shipper** dialog box opens, allowing you to enter a new vendor. Enter the new information and click **Save** to return to the claim form.

15. Enter the name of the 3<sup>rd</sup> party delivery carrier, if applicable, in the **Delivery Carrier** box.
16. Enter the buyer code in the **Buyer Code** box.
17. Move to **Invoice #** and enter the information if applicable.

The **Vendor Claim #** is assigned by the vendor and provided when they acknowledge the claim. (See *"Updating Claims"* for more information.)

18. Enter the carrier's bill-of-lading number in the **BOL Carrier** box. If another claim exists with the same BOL number, you will receive a message indicating that the BOL already exists. You have the option to save the claim with a duplicate BOL number, or return to the claim and modify the number.
19. Enter the date of the bill-of-lading in the **BOL Date** box or click the **Calendar** button and select the date from the calendar.

20. Enter the date on which the delivery was made in the **Delivery Date** box or click the **Calendar** button and select the date from the calendar. *This information is required to save a claim.*
21. Enter the PO Number in the **PO Number** box. *This information is required to save a claim.*
22. Click the **Consignee** button. The **Find Consignee** dialog box opens.

**Find Consignee** Find Add Close

Field to search: Full Name  
The "\*" (asterisk) can be used for a wild card search in your criteria.

Find criteria:

Max records: 30

Find region: NORTH

Use My Consignee ☐ (Checked = True : Unchecked = False)

---

Consignee: Demo - Customer [CU-001]  
Contact: First LastName  
Address: 123 Main Street  
Cleveland, OH 44110  
UNITED STATES  
Apply

---

Consignee: HM Industries  
Contact: HM Industries  
Address: 123 W. Maya Street  
Milwaukee, MN  
53201  
Apply

Internet | Protected Mode: On 100%

Select the consignee from the **Consignee** list and click the **Apply** button. *This information is required to save a claim.*

If you would like to see all consignees, not just the consignees in your list, click to remove the check mark in the **Use My Consignee** box.

If the Consignee is not in the list, click the **Add** button. The **New Consignee** dialog box opens, allowing you to enter a new Consignee. Enter the new information and click **Save** to return to the claim form.



23. The Shipper defaults to the selected Vendor. If this is not correct, click the **Shipper** button. The **Find Shipper** dialog box opens.

If the Region is incorrect, select a different region from the list. By default, the region you are working in is in the **Find Region** box.

Select the shipper from the **Shipper** list and click the **Apply** button to return to the claim form. *This information is required to save a claim.*

If you would like to see all shippers, not just the shippers in your list, click to remove the check mark in the **Use My Shipper** box.

If the Shipper is not in the list, click the **Add** button. The **New Shipper** dialog box opens, allowing you to enter a new Shipper. Enter the new information and click **Save** to return to the claim form.

24. Move to the **Internal Claim #** box and enter the number.
25. Move to the **In/Out** box and select the option that best indicates the shipment type.
26. Move to the **Trans Mode** box and select the method of transportation.
27. Move to the **Acct. Rec #** box and add the A/R ledger number assigned to the claim by accounting for the carrier receivable.
28. Move to the **Domestic/International** box and select the type of shipment. By default, this is set to Domestic. *This information is required to save a claim.*
29. Move to the **Document Origin** box and enter the origin of the claim documentation.
30. Move to the **Shipped From** box. If the shipment was made from a location other than that shown for the **Shipper**, enter the address from which the shipment was actually made.

31. Move to the **Replacement SOID** and enter the information.
32. Move to the **Invoice Amt** box and enter the amount of the invoice. By default, the amount is “0”.
33. The **Additional Claim Information** link allows you to enter more information for the claim. This link is not active until after the claim is saved.
34. Move to the **Requester Name** box and enter the name of the person or organization requesting the claim.
35. Move to the **Recovery Amt** box and enter the anticipated claim recovery.
36. Move to the **Cost Center** box and enter the cost center responsible for the claim.
37. For the **Claim Responsibility**, click on the circle next to the responsible party. By default, this is set to “Shipper Insurance”.
38. Move to the **Vehicle #** box and enter the number. The vehicle number can be the container or trailer box number.
39. Move to the **Seal #** box and enter the number.
40. Move to the **Seal Intact** box and enter the information.
41. Move to the **Date Requested** box and click the calendar button and select the date. *This information is required to save a claim.*
42. Move to the **Date Filled** box and click the calendar button and select the date filed. *This information is required to save a claim.*
43. The **Cycle Time** box contains the number of days from the date requested to the date filed. The number of days is system generated and cannot be modified. There is no date until the claim is saved.
44. The **Updated** box contains the date the claim was last modified. The date is system generated and cannot be modified. There is no date until the claim is saved.



**NOTE:** Save the claim by clicking the Save button. You will not be able to add the Shipping Products, Credit/Debit, Documents, Activities, Diary, or Payments until the claim is saved.

Continue with the following steps to enter any required information in the **Shipping Products**, **Add'l Charges**, **Credit/Debit**, **Documents**, **Activities** and **Diary** tabs.

## SHIPPING PRODUCTS TAB

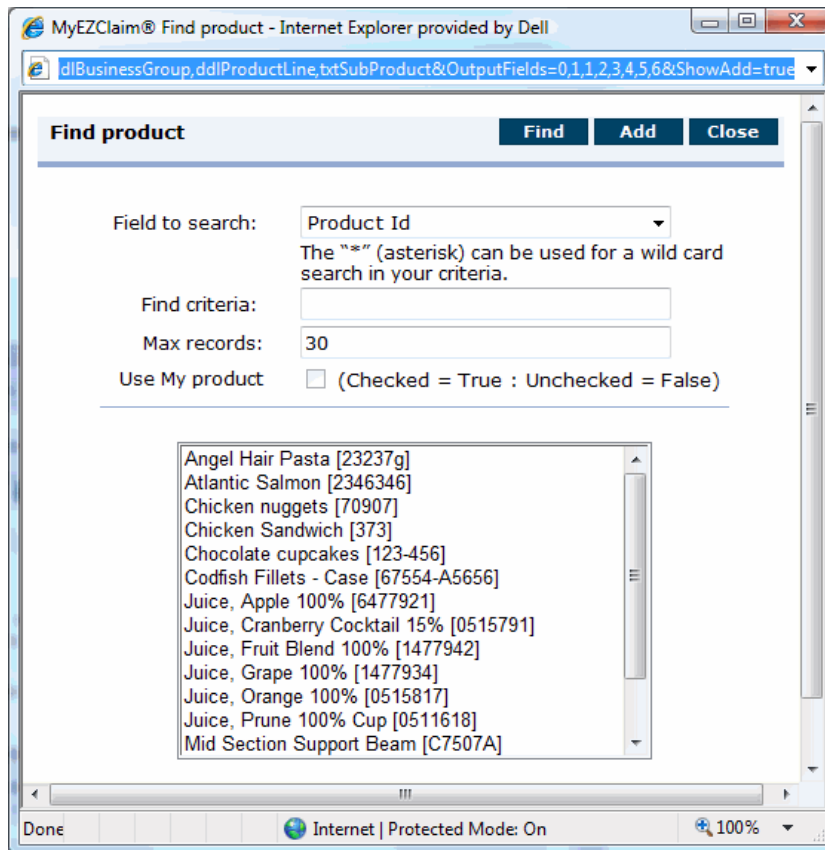
The **Shipping Products** tab contains all of the product information related to this claim. There are three different ways to add product information to the claim. You can use the **Add Product** button, **Paste Products** button, or the **Multiple Products** button.

### Using the Add Product Button

1. From the Claim Properties page, select the **Shipping Products** tab.

The screenshot displays the 'Shipping Products' tab within a web application. At the top, there is a navigation bar with buttons for 'Shipping Products', 'Add'l Charges', 'Documents', 'Activities', 'Diary', 'Payments', 'Claim Tasks', 'Credit/Debit', and 'Subrogation'. Below this is a table with the following headers: 'product', 'description', 'reason code', 'qty.', 'unit cost', 'weight', 'catch wt.', 'rel val/disp %', and 'line total'. The table is currently empty, with a message 'No Products have been entered.' displayed below it. At the bottom of the table area, there are four buttons: 'Add Product', 'Paste Products', 'Multiple Products', and 'Delete Product'. The footer of the application shows 'Enterprise Edition' and a status bar indicating 'Internet | Protected Mode: On'.

- Click the **Add Product** button to add a new product to the claim. The **New Product** dialog box and the **Find Product** dialog opens.



- From the **Product** list, double-click the product for which the claim is being issued. The product's price and weight are copied into the **Price** and **Weight** boxes, respectively.  
If you would like to see all products, not just the products in your list, click to remove the check mark in the **Use My Product** box.  
If the Product is not in the list, click the **Add** button. The **New Product** dialog box opens, allowing you to enter a new product. Enter the new information and click **Save** to return to the claim.  
(See "Adding a Product to the Product List" for more information.)
- In the **Quantity** box enter the quantity of the product involved in the claim.
- If the unit price is different from that shown in the **Price** box, enter the correct price.
- If the weight is different from that shown in the **Weight** box, enter the correct weight for a single unit/case of the selected product. If you are using the Release Value method for the line item calculation you must enter a weight.
- Move to the **Sub Product** box and enter any additional product information.
- Move to the **Receiving Doc ID** box and enter the doc ID.
- Move to the **Merchandise ID** box and enter the ID.
- In the **Shipped** and **Received** boxes, enter the information.
- In the **Import (Y/N)** box, select whether or not the product was an import.

12. By default, the reason code matches the reason code selected for the claim. If this is not correct, select a reason code from the **Reason Code** list.
13. Move to the **Serial Number** box and enter the serial number.
14. Move to the **Invoice Number** and enter the invoice number.
15. Move to the **Sales Order Number** box and enter the sales order number.
16. The **Business Group** and **Product Line** default to what is configured on the Product. If this information is not correct, select the business group and product line from the list.



**NOTE:** You can calculate the line item total using either the Product Disposition method or the Release Value method.

#### ☐ **Product Disposition Method**

By default, the Disposition Method is calculated as (Quantity \* Price) \* Disposition Percentage. The disposition method can be calculated as (Price \* Weight) \* Disposition Percentage by checking the **Catch Wt. Calc.** check box under the **Weight** box.

- a) Select the **Disposition** option. The **Disposition** list is enabled.
- b) Select the appropriate product disposition and discount from the **Disposition** list.

If you need a disposition that is not in the list, you need to close the **New Product** dialog box – you must enter a quantity if you want the product information to be saved with the claim.

- c) If the disposition discount needs to be modified, move to the **Percent** box and enter a new percent discount. A line-item total is displayed in the **Line Total** box. This is the product of the **Quantity** and the **Price**, less the discount (either from the **Disposition** or the **Percentage** box).

#### ☐ **Release Value Method**

- a) Select the **Release** option. The **Release** list is enabled.
- b) Select the appropriate release value and rate from the **Release** list.

If you need a release value that is not in the list, you need to close the **New Product** dialog box – you must enter a quantity if you want the product information to be saved with the claim.

- c) If the release value rate needs to be modified, move to the **Release Value** box and enter a new release value. A new **Line Total** is calculated. This is the product of the **Quantity** and **Weight** and **Release Value**.
  17. If you have multiple products to add, click **Save & Add New** to keep adding products. If this is the last product to be added to the claim, click the **Save** button to return to the Claim Properties window.
  18. If there are any applicable discounts, enter the value in the **Discount Amt** box.
  19. Enter any applicable freight charges in the **Freight Amt** box.
  20. If there are any other applicable charges to include on the claim form, enter the charges on the **Add'l Charges** tab. These charges will be totaled in the **add'l charges** box. The Add'l Amt is for display only, you cannot manually modify this value.
  21. The **Total Amt** is calculated based on the products listed, minus any values listed in the **Reimbursement Amt**, **Write-Off Amt**, and **Discount Amt** boxes. The Total Amt also adds any charges added in the Freight Amt and Add'l Charges boxes. The **Total Amt** box is for display only, you cannot manually modify this value.
- The **Outstanding Amt** is calculated by the **Total Amt** minus any payments made. The Outstanding Amt is for display only, you cannot manually modify this value.

The currency is shown in USD. To change the currency, click the **Globe** icon and select a different currency.



**NOTE:** Any additions or changes to the Shipping Products information are NOT cancelled by clicking the Cancel button in the Claim Properties window (this does not include the Reimbursement Amt, Write-Off Amt, Discount Amt, Freight Amt, and Other Amt). You must manually undo any modifications you've made in this section.

### Using the Paste Products Button

The **Paste Products** button is available to allow SAP users to copy product information from your SAP screen and paste the part number and Quantity to the products screen. From the Claim Properties page, click the **Paste Products** button. The **Copy & Paste Products** dialog box opens. You can copy the products from the SAP screen (only the part number and quantity) and paste to the screen. Edit the screen for the correct part number and quantity.

### Using the Multiple Products Button

The **Multiple Products** button is available to allow you to add multiple products all at once. You can copy and paste the information from another screen or just type in the information. From the Claim Properties page, click the **Multiple Products** button. The **New Product** dialog box opens. Enter the information and then **Save** to return to claim.



**NOTE:** When using the **Multiple Products** to input your products for the claim, the **Reason Code** does not default to the selected Reason code for the claim.

### ADD'L CHARGES TAB

The **Add'l Charges** tab contains information regarding additional charges associated with the claim. From here you can enter any additional charges associated with the claim such as restocking fees.

1. From the Claim Properties window, select the **Add'l Charges** tab.

The screenshot shows a web application window titled 'Enterprise Edition'. At the top, there is a navigation bar with several tabs: 'Shipping Products', 'Add'l Charges' (which is selected and highlighted in blue), 'Documents', 'Activities', 'Diary', 'Payments', 'Claim Tasks', 'Credit/Debit', and 'Subrogation'. Below the navigation bar, there is a table with two columns: 'description' and 'amount'. The table is currently empty, and a message below it states 'No Additional Charges have been entered.' Below this message is a blue button labeled 'Add Charges'. At the bottom of the window, there is a status bar that says 'Done' on the left and 'Internet | Protected Mode: On' on the right, along with a zoom level of '100%'.

2. Click the **Add Charges** button. The **New Additional Charge** dialog box opens.

3. Select the **Charge Type** from the list.
4. Move to the **Amount** box and enter the charge amount.
5. If you have more charges to enter, click the **Save & Add New** button. This will save the charge to the claim and open another New Additional Charge dialog box.

If you have no more charges to enter, click the **Save** button to return to the claim.

## DOCUMENTS TAB

The **Documents** tab contains information regarding the documentation associated with the claim. From here you can enter the Freight Bill Pro # (this is used as the Pro Number/Airway Bill Number on claim letters and forms), claimant reference numbers, inspection reports, etc. You also have the ability to attach documents to the claims from here.

1. From the Claim Properties window, select the **Documents** tab.

2. Click the **Add** button. The **New Document** dialog box opens.

myEZClaim® Claim Document - Internet Explorer provided by ...

http://86.124.36.102/myezclaimNet\_2008/Navigation/Claims/Pages/Document

**New Document**

Save Delete Close

Save & Add New

document type:

document id:

date of: 12/29/2008

file name:

updated by:

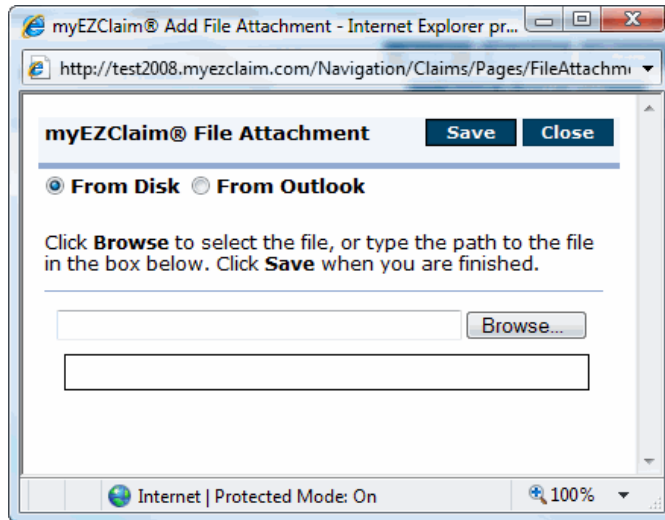
last update:

Attach View

Internet | Protected Mode: On 100%

3. Select the **Document Type** from the list.
4. Move to the **Document ID** box and enter the document ID.
5. Move to the **Date Of** box. If the date is not correct, you can enter a new date.  
OR click the **Calendar** button to select the date from the calendar.
6. Click the **Save** button when you are done. If you are not going to attach a document, click the **Close** button to return to the claim.

7. Click the **Attach** button to attach the document to the claim if applicable. The **File Attachment** dialog box opens.



8. You can attach files by using the **From Disk** or **From Outlook** options.
- If you are attaching **From Disk**,
- Click the **Browse** button. The **Choose File** dialog box opens.
  - Locate and select the document you want to attach to the claim.
  - Click the **Open** button to return to the **File Attachment** dialog box.
  - Click the **Save** button to return to the **New Document Dialog** box.

If you are attaching **From Outlook**,

- Select the **From Outlook** radio button
- Click the **Get Emails** button.
- Locate and select the email document you want to attach to the claim.
- Click the **Save** button to return to the **New Document Dialog** box.



**NOTE:** Any comments entered in the Comments box will be printed on the claim form.

## ACTIVITIES TAB

The **Activities** tab contains information that helps you track the status of the claim.

If you have contacted the carrier to inform them of your intent to file a claim, you should add the Notice of Intent.



1. From the Claim Properties window, select the **Activities** tab.

2. Click the **Add Activity** button. The **New Activity** dialog box opens.

3. From the **Activity Type** list, select **Notice of Intent Filed**.
4. Move to the **Date Of** box. If the date is not correct, you can enter a new date.  
OR click the **Calendar** button next to select the date from the calendar.

The **Created By** box shows the person who last created or modified the activity. It is for display only, you cannot manually modify it.

The **Date Created** box shows the date of when the activity was created or last modified. It is for display only, you cannot manually modify it.

5. Click the **Save** button

Generally, you won't enter any other information in the **Activities** tab when first entering a claim. This information is entered when updating a claim. Some of the boxes in this tab are automatically updated. When the claim is created, the **Created Date** is filled with the current date. When you update a claim, the **Last Update** box is filled with the current date.

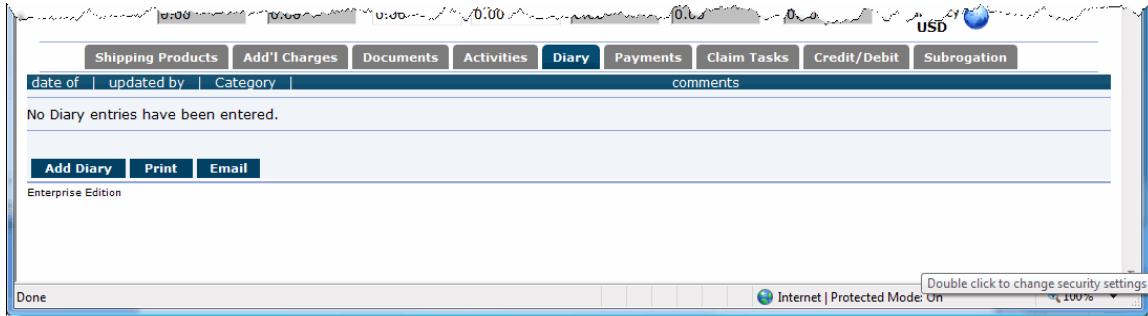


**NOTE:** Any changes made in Shipping Products, Credit/Debit, Documents, Activities, Diary, or Payments are NOT cancelled by clicking the Cancel button. You must manually undo any changes you've made in these sections.

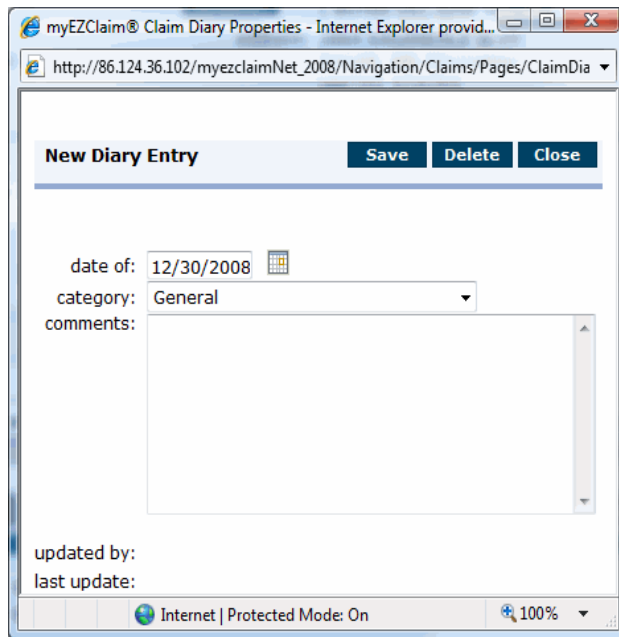
## DIARY TAB

The **Diary** tab is used to add diary notes that help you keep track of the events associated with the claim.

1. From the Claim Properties window, select the **Diary** tab.



2. Click the **Add Diary** button to add a new diary note. The **New Diary Entry** dialog box opens.



3. If you want to change the date, enter a new date in the **Date Of** box.  
OR click the **Calendar** button and select the date from the calendar.
  4. Enter the comments you want to be saved with this claim.
  5. Click the **Save** button to return to the claim form. OR, click the **Close** button to not save the comments.
- You can delete a diary note by selecting the note and clicking the **Delete** button.



**NOTE:** You can print the *Claims with Diary* report by clicking the **Print** button.

## CREDIT/DEBIT TAB

The credit/debit tab contains information regarding documentation associated with the claim. This internal document can be printed for submission to any department, such as accounting, transportation, etc. and contains a hierarchy of approval authority levels for sign-off. Information placed on these documents will not appear on the claim form.

1. From the Claim Properties window, select the **Credit/Debit** tab.

2. Go to the **Memo Type** box and select either Credit or Debit.
3. Move to the **Memo Number** box and enter the memo number.
4. Go to the **Memo Date** and use the calendar button to select the date.
5. Go to the **Memo Bill-To/Ship-To** box and enter the relevant information.
6. Click the **Print** button. The Credit or Debit memo form will appear in a PDF file for printing. Save or print the form. Close the screen to return to the Claim Properties window.

## PAYMENTS TAB

The **Payments** tab is used to keep track of payments received against the claim.

Generally, you won't enter any other information in the **Payments** tab when first entering a claim. This information is entered when updating a claim.

## CLAIMS TASKS TAB

The **Claim Tasks** tab is used to keep track of tasks for the claim.

Generally, you won't enter any information in this tab when first entering a claim. This information is entered when updating a claim.

## SUBROGATION TAB

The **Subrogation** tab is used to keep track of payments made for the claim.

Generally, you won't enter any information in the **Subrogation** tab when first entering a claim. This information is entered when updating a claim.

## UPDATING CLAIMS

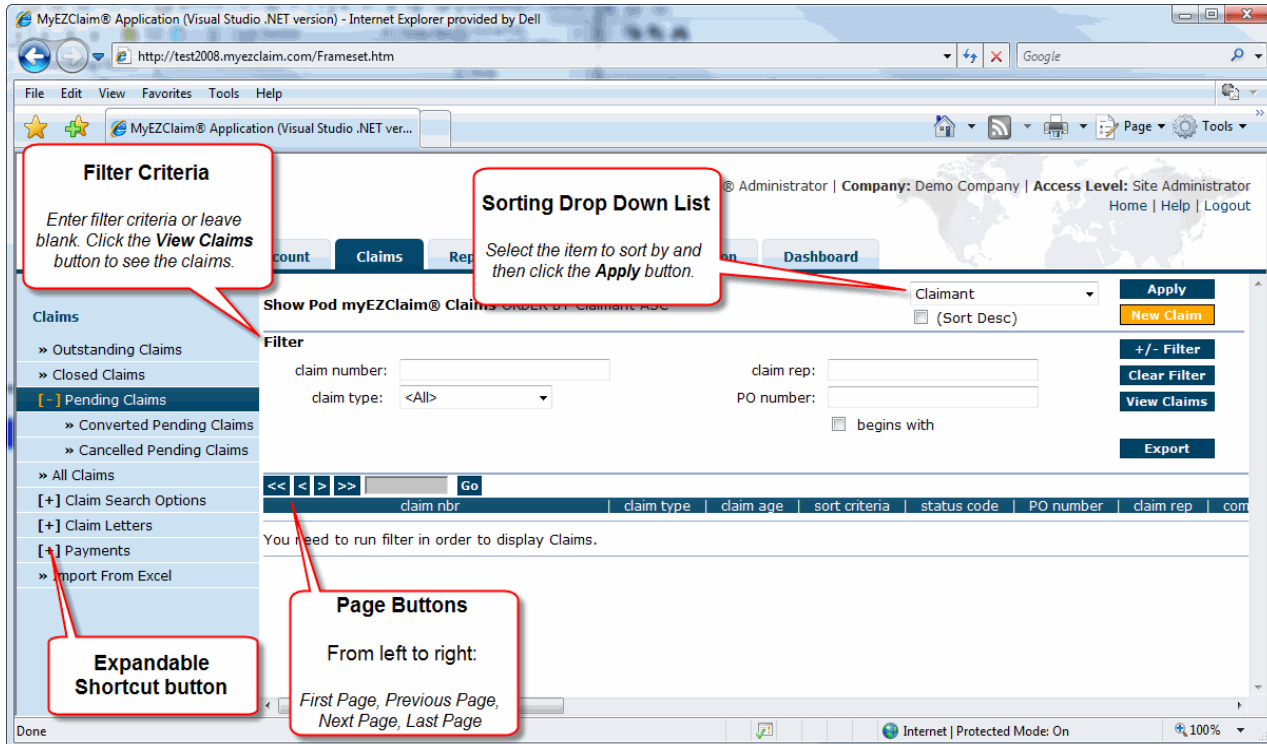
As you correspond with the carrier, and receive acknowledgements and/or payments, you need to update the claim to indicate that these events have occurred. There may also be times when you need to make corrections to the information in the claim. The process of updating claims is similar to that of creating a new claim, and can be done at any time.

The Claims page is set up so you can sort, organize, and update your claims as quickly as possible. By default, the claims are sorted by the claim number. You can sort the claims just by selecting the item to sort by from the **Sorting** drop-down list and then clicking the **Apply** button.

You can also use the page buttons to quickly get to the desired record or use the filter to search by claim numbers, claim types, or claim reps.

If you don't want to filter your claims, you can click the **Run** button to get all of the claims for the selected shortcut.

The following is a description of the Claims page.



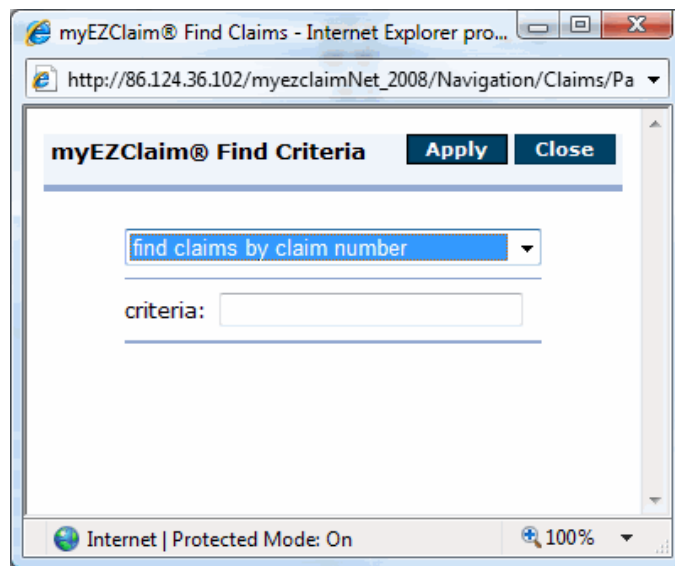
## OPENING A CLAIM

1. Click the **Claims** tab. The Claims page opens.
2. Click the **View Claims** button to get a listing of all outstanding claims.
3. Locate and select the claim to be updated. The **Claim Properties** page opens.

## SEARCHING FOR A CLAIM

The search feature is very useful if you have many claims, outstanding or closed, and you don't want to scroll through the list. The search covers all claims, regardless of the claim status.

1. Click the **Claims Search Options** shortcut. The Claims Search Options expands showing a list of other options.
2. Click the **Find Claims** shortcut. The **Find Criteria** window opens. You can search for a claim by claim number, bill of lading date, bill of lading carrier, A/R reference number, freight bill pro#, or PO number.



3. Select one of the options from the drop-down menu.
4. In the **Criteria** box, enter the appropriate information.
5. Click the **Apply** button.

If a claim with the specified number, date, or carrier exists, the claim will be listed on the page. Otherwise, a message stating "You do not have any Claims that match your criteria." will be shown.

## FILTERING THE CLAIM LIST

The filter feature can be used to perform comparison searches for claims. You can search for claims based on any field within a claim.

1. Click the **Claims Search Options** shortcut. The Claims Search Options expands showing a list of other options.
1. Click the **Filter View** shortcut. The **Filter Criteria** window opens.

2. From the **Field Name** list, select the field on which you want to filter.
3. From the **Operator** list, select the search operator you want to use.
4. Select the sort order desired (Ascending or descending).
5. Select the concatenation desired (And or Or). This allows you to filter for claims that meet several requirements. See examples.
6. Move to the **Criteria** box and enter the search criteria.
7. Click the **Add** button to add the item to the search criteria.
8. Click the **Run** button to return to the Filtered Claims List. All claims matching the search criteria are displayed. The filter search criteria is displayed in the current window banner.

**Examples:**

To search for all of the claims that have a Claim ID that begins with **LD**, select **Claim Number** from the **Field Name** list, and select **like ('?' - single or '\*' - multiple)** from the **Operator** list, and then enter **LD\*** in the **Criteria** box. When you click the **Run** button, you are returned to the Claims page. Each claim that has a Claim ID that begins with the letters "LD" are displayed in the Claims page.

To search for claims that have been modified or created on 10/8/2003, select **Date Created** from the **Field Name** list and select **= (value is equal to)** from the **Operator** list, and then enter **10/8/2003** in the **Criteria** box. When

you click the **Add** button, The search criteria is shown in the **Show me all claims where** section. Select **Last Modified** from the **Field Name** list, then select = (value is equal to) from the **Operator** list, Select **Or** for **Concatenation** and then enter **10/8/2003** in the **Criteria** box. Click the **Add** button and then click the **Run** button. Each claim that has been last modified on or created on 10/8/2003 are displayed in the Claims page.

## UPDATING LOSS AND DAMAGE CLAIMS

1. Click the claim to be updated. The **Claim Properties** window opens with the selected claim.

### Claim Activities

#### *Acknowledgement*

2. If you received an acknowledgement for this claim, click the **Activities** tab and move to the **Acknowledged** box to enter the date on which you received the acknowledgement. If the carrier assigned a claim ID, enter this number in the **Carrier Claim #** box that is located in the Carrier area. The carrier has 30 days to provide a claim ID and to acknowledge a claim.
3. Click the **Save** button.

#### *Claim Cancelled*

4. If the claim has been cancelled, click the **Activities** tab and move to the **Cancelled/Code** box to enter the date on which the claim was cancelled.
5. Move to the box to the right of the **Cancelled/Code** box, and select the reason that best describes why the claim was cancelled.
6. Change the Status of the claim (upper right hand corner) to Closed.
7. Click the **Save** button.

#### *Claim Rejected*

8. If the claim has been rejected, click the **Activities** tab and move to the **Rejected/Code** box to enter the date on which the claim was rejected. You can use the calendar button to open the calendar and select the appropriate date.
9. Move to the box to the right of the **Rejected/Code** box, and select the reason that best describes why the claim was rejected.
10. Change the Status of the claim (upper right hand corner) to Closed.
11. Click the **Save** button.

#### *Claim Denied*

12. If the claim has been denied, click the **Activities** tab and move to the **Denied/Code** box to enter the date on which the claim was denied. You can use the calendar button to open the calendar and select the appropriate date.
13. Move to the box to the right of the **Denied/Code** box, and select the reason that best describes why the claim was denied.
14. Change the Status of the claim (upper right hand corner) to Closed.
15. Click the **Save** button.

#### *Reprint Claim Form or Letter*

16. If you need to re-print a letter, or regenerate a claim form, you can do so by removing the appropriate activity on the **Activities** tab. The **Mailed** box indicates when the claim form was generated.
17. Once the date has been removed, you must close the Claim Properties window, and regenerate the required document.

#### *Diary*

Select the **Claim Diary** tab to add or modify the claim diary notes. See "Diary Tab" for information on adding claim diary notes to a claim.

*Entering Payments Received*

1. Select the **Payments** tab to add information on payments you have received.
2. Click the **Add Payment** button to add a payment record. The **New Payment** dialog box opens.

3. From the **Payment Type** list, select the payment type that best describes the payment received.
4. Move to the **Payment Amount** box and enter the dollar amount that was received for the claim. Do not enter the dollar sign.
5. Move to the **Payment Date** box and enter the date on which the payment was made.  
OR click the **Calendar** button and select the date from the calendar.
6. Move to the **Check Number** box and enter the check number for the payment you received.
7. Move to the **Check Date** box and enter the date of the check.  
OR click the **Calendar** button and select the date from the calendar.
8. Move to the **Trans Number** box and enter the transaction number from the batch payment.
9. Move to the **Trans Date** box and enter the transaction date for the batch payment.  
OR click the **Calendar** button and select the date from the calendar.
10. Move to the **Trans Type** box and enter the transaction type for the payment — **P** for Payment or **R** for Reimbursement. If the type is **R**, the reimbursement amount is shown in the **Reimbursement Amt** box when the payment is saved. The reimbursement amount does not get applied towards the **Outstanding Amt**.
11. If the payment has not been verified, remove the check mark from the **Verified** box.
12. Move to the **Comments** box and enter any comments associated with the payment.
13. Click **Save** to return to the Claim Properties window.

You can modify an existing payment by selecting the payment. Make the required changes in the **Payment Properties** dialog box and click **Save** to return to the Claim Properties window.



You can delete an existing payment by selecting the payment and clicking the **Delete** button in the **Payment Properties** dialog box. A confirmation dialog displays asking if you are sure you want to delete the record. Click **OK** to delete the record, or **Cancel** to keep the record. You are returned to the Claim Properties window.

After you've made the required updates, click the **Save** button to close the Claim Properties window and save the updated information. If you need to cancel the changes you've made, simply click the **Cancel** button and the window is closed.

### Entering a Claim Task

1. Select the **Claim Tasks** tab to add information.
2. Click **Add Task**. The **New Claim Task** dialog box opens.

3. From the **Priority** list, select the priority for the task.
4. The **Status** list will default to Open. The task is considered open until it completed. Once it is completed, the Status should be set to Closed.
5. Move to the **Due Date** box. If the date is not correct, you can enter a new date.  
OR click the **Calendar** button to select the date from the calendar. The Due Date indicates when the second request email will be sent.
6. Move to the **Days Until Notification** box. If the number is not correct, enter a new number. The Days Until Notification determines how many days between email notifications. If a "0" (zero) is entered, only the New Task email will be sent. No other notifications will be sent.
7. Move to the **Number of Notifications** box. Select how many notifications to send.
8. Move to the **Description** box. Enter a description for the task.
9. Move to the **Comments** box. Enter any comments for the task.

10. On the **Groups** tab, select the group(s) that will be responsible for completing the task.
11. On the **Administration Groups** tab, select the group(s) that will be notified when the task is closed.
12. If there is a charge to the contractor, click the **Charge to Contractor** tab and check the box **charge to contractor**. Enter all applicable information.
13. Click the **Save** button.

#### Entering Subrogation

1. Select the **Subrogation** tab to add information.
2. Click **Add Subrogation** to create a new record. The **New Subrogation** dialog box opens.

myEZClaim® Claim Subrogation - Internet Explorer provided by Dell

http://test2008.myezclaim.com/MyEZCLaimNet/Navigation/Claims/Pages/ClaimSubr

**New Subrogation** Save Delete Close

payment date: 12/30/2008 payment type: [dropdown]

payment amount: [text box] check number: [text box] reason: [dropdown]

trans number: [text box] trans date: [text box]

description: [text area]

status: [dropdown]

updated by: n/a  
last update: n/a

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3. From the **Payment Type** list, select the payment type that best describes the payment.
4. Move to the **Payment Amount** box and enter the dollar amount that paid for the claim. Do not enter the dollar sign.
5. Move to the **Check Number** box and enter the check number for the payment you made.
6. Move to the **Reason** list and select the reason that best describes why a payment was made.
7. Move to the **Trans Number** box and enter the transaction number from the batch payment.
8. Move to the **Trans Date** box and enter the transaction date for the batch payment.
9. Move to the **Description** box and enter any comments associated with the payment.
10. Move to the **Status** list and select a status.
11. Click **Save** to return to the Claim Properties window.

You can modify an existing subrogation record by selecting the subrogation. Make the required changes in the dialog box and click **Save** to return to the Claim Properties window.

You can delete an existing subrogation by selecting the subrogation and clicking the **Delete** button in the dialog box. A confirmation dialog displays asking if you are sure you want to delete the record. Click **OK** to delete the record, or **Cancel** to keep the record. You are returned to the Claim Properties window.

After you've made the required updates, click the **Save** button to close the Claim Properties window and save the updated information. If you need to cancel the changes you've made, simply click the **Cancel** button and the window is closed.



**NOTE:** Any changes made in Shipping Products, Credit/Debit, Documents, Activities, Diary, Payments, or Subrogation are NOT cancelled by clicking the Cancel button. You must manually undo any changes you've made in these sections.

## UPDATING OVERCHARGE CLAIMS

1. Click the claim to be updated. The **Claim Properties** window opens with the selected claim.

### Claim Activities

#### *Acknowledgement*

2. If you received an acknowledgement for this claim, click the **Activities** tab and move to the **Acknowledged** box to enter the date on which you received the acknowledgement. You can instead use the calendar button to open the calendar and select the appropriate date. If the carrier assigned a claim ID, enter this number in the **Carrier Claim #** box that is located in the Carrier area. The carrier has 30 days to provide a claim ID and to acknowledge a claim.

#### *Claim Cancelled*

3. If the claim has been cancelled, click the **Activities** tab and move to the **Cancelled/Code** box to enter the date on which the claim was cancelled. You can instead use the calendar button to open the calendar and select the appropriate date.
4. Move to the box to the right of the **Cancelled/Code** box, and select the reason that best describes why the claim was cancelled.

#### *Claim Rejected*

5. If the claim has been rejected, click the **Activities** tab and move to the **Rejected/Code** box to enter the date on which the claim was rejected. You can instead use the calendar button to open the calendar and select the appropriate date.
6. Move to the box to the right of the **Rejected/Code** box, and select the reason that best describes why the claim was rejected.

#### *Claim Denied*

7. If the claim has been denied, click the **Activities** tab and move to the **Denied/Code** box to enter the date on which the claim was denied. You can instead use the calendar button to open the calendar and select the appropriate date.
8. Move to the box to the right of the **Denied** box, and select the reason that best describes why the claim was denied.

#### *Reprint Claim Form or Letter*

9. If you need to re-print a letter, or regenerate a claim form, you can do so by removing the date from the appropriate box on the **Activities** tab. The **Mailed** box indicates when the claim form was generated.
10. Once the date has been removed, you must close the Claim Properties window, and regenerate the required document.

### Diary

Select the **Claim Diary** tab to add or modify the claim diary notes. See "Diary Tab" for information on adding claim diary notes to a claim.

*Entering Payments Received*

1. Select the **Payments** tab to add information on payments you have received.
2. Click the **Add** button to add a payment record. The **New Payment** dialog box opens.

3. From the **Payment Type** list, select the payment type that best describes the payment received.
4. Move to the **Payment Amount** box and enter the dollar amount that was received for the claim. Do not enter the dollar sign.
5. Move to the **Payment Date** box and enter the date on which the payment was made.  
OR click the **Calendar** button and select the date from the calendar.
6. Move to the **Check Number** box and enter the check number for the payment you received.
7. Move to the **Check Date** box and enter the date of the check.  
OR click the **Calendar** button and select the date from the calendar.
8. Move to the **Trans Number** box and enter the transaction number from the batch payment.
9. Move to the **Trans Date** box and enter the transaction date for the batch payment.  
OR click the **Calendar** button and select the date from the calendar.
10. Move to the **Trans Type** box and enter the transaction type for the payment — **P** for Payment or **R** for Reimbursement. If the type is **R**, the reimbursement amount is shown in the **Reimbursement Amt** box when the payment is saved. The reimbursement amount does not get applied towards the **Outstanding Amt**.
11. If the payment has not been verified, remove the check mark from the **Verified** box.
12. Move to the **Comments** box and enter any comments associated with the payment.
13. Click **Save** to return to the Claim Properties window.

You can modify an existing payment by selecting the payment. Make the required changes in the **Payment Properties** dialog box and click **Save** to return to the Claim Properties window.

You can delete an existing payment by selecting the payment and clicking the **Delete** button in the **Payment Properties** dialog box. A confirmation dialog displays asking if you are sure you want to delete the record. Click **OK** to delete the record, or **Cancel** to keep the record. You are returned to the Claim Properties window.

After you've made the required updates, click the **Save** button to close the Claim Properties window and save the updated information. If you need to cancel the changes you've made, simply click the **Cancel** button and the window is closed.

### Entering a Claim Task

1. Select the **Claim Tasks** tab to add information.
2. Click **Add Task**. The **New Claim Task** dialog box opens.

myEZClaim® Claim Task - Internet Explorer provided by Dell

http://test2008.myezclaim.com/MyEZClaimNet/Navigation/Claims/Pages/ClaimTask\_Popup.aspx?claimId=

**New Claim Task** [Save] [Delete] [Close]

**Notification Schedule:** ([Refresh](#))

PENDING - Initial Email - New Task  
 1/6/2009 2nd Request Notification Email  
 1/13/2009 3rd Request Notification Email  
 1/20/2009 4th Request Notification Email  
 1/27/2009 Final Email - 'To Be Paid' Notification

priority: status: due date:  
 Normal Open 1/6/2009

days until notification: number of notifications:  
 7 (5) Initial, 2nd, 3rd, 4th, and final

description:

comments:

**Groups** Administration Groups Charge To Contractor

☐ Andy Demo  
☐ Atlanta Hub

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3. From the **Priority** list, select the priority for the task.
4. The **Status** list will default to Open. The task is considered open until it completed. Once it is completed, the Status should be set to Closed.
5. Move to the **Due Date** box. If the date is not correct, you can enter a new date.  
OR click the **Calendar** button to select the date from the calendar. The Due Date indicates when the second request email will be sent.
6. Move to the **Days Until Notification** box. If the number is not correct, enter a new number. The Days Until Notification determines how many days between email notifications. If a "0" (zero) is entered, only the New Task email will be sent. No other notifications will be sent.
7. Move to the **Number of Notifications** box. Select how many notifications to send.
8. Move to the **Description** box. Enter a description for the task.
9. Move to the **Comments** box. Enter any comments for the task.
10. On the **Groups** tab, select the group(s) that will be responsible for completing the task.
11. On the **Administration Groups** tab, select the group(s) that will be notified when the task is closed.
12. If there is a charge to the contractor, click the **Charge to Contractor** tab and check the box **charge to contractor**. Enter all applicable information.
13. Click the **Save** button.

*Entering Subrogation*

1. Select the **Subrogation** tab to add information.
2. Click **Add Subrogation** to create a new record. The **New Subrogation** dialog box opens.

3. From the **Payment Type** list, select the payment type that best describes the payment.
4. Move to the **Payment Amount** box and enter the dollar amount that paid for the claim. Do not enter the dollar sign.
5. Move to the **Check Number** box and enter the check number for the payment you made.
6. Move to the **Reason** list and select the reason that best describes why a payment was made.
7. Move to the **Trans Number** box and enter the transaction number from the batch payment.
8. Move to the **Trans Date** box and enter the transaction date for the batch payment.
9. Move to the **Description** box and enter any comments associated with the payment.
10. Move to the **Status** list and select a status.
11. Click **Save** to return to the Claim Properties window.

You can modify an existing subrogation record by selecting the subrogation. Make the required changes in the dialog box and click **Save** to return to the Claim Properties window.

You can delete an existing subrogation by selecting the subrogation and clicking the **Delete** button in the dialog box. A confirmation dialog displays asking if you are sure you want to delete the record. Click **OK** to delete the record, or **Cancel** to keep the record. You are returned to the Claim Properties window.

After you've made the required updates, click the **Save** button to close the Claim Properties window and save the updated information. If you need to cancel the changes you've made, simply click the **Cancel** button and the window is closed.



**NOTE:** Any changes made in Shipping Products, Credit/Debit, Documents, Activities, Diary, Payments, or Subrogation are NOT cancelled by clicking the Cancel button. You must manually undo any changes you've made in these sections.

## WRITING-OFF CLAIMS

You can automatically write-off claims that are closed with an unpaid balance; you do not need to enter any information in the **Write-off** box. The write-off amount is calculated when you close an unpaid claim.

1. Verify that the payments received are less than the total of the claim, then change the status of the claim to CLOSED.
2. Click the **Save** button to close the claim form. A message will open asking you to confirm that you want to write off the balance.
3. Click the **OK** button. The **Claim Write-Off** dialog box opens.

4. In the **Write-Off Reason**, select the reason that best describes why the claim was written off.
5. Enter the date on which the claim was written off in the **Write-Off Date**. You can instead use the calendar button to open the calendar and select the appropriate date.
6. Click the **Save** button. The unpaid amount is written off and the Writ-Off information shown on the Activities tab is updated.

## REVERSING A CLAIM

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You can reverse a claim amount just by clicking a button. Reversing a claim creates an identical claim with a negative balance. The original claim will include a diary entry that list the claim number of the reversed claim. The claim created by reversing the original claim includes a diary entry that lists the original claim number. To reverse a claim, the claim must have at least one payment and have a status of Closed.

1. Edit the claim that needs to be reversed.



**NOTE:** If you attempt to reverse a claim that has already been reversed, a dialog box will open and show the reversed claim number.

---



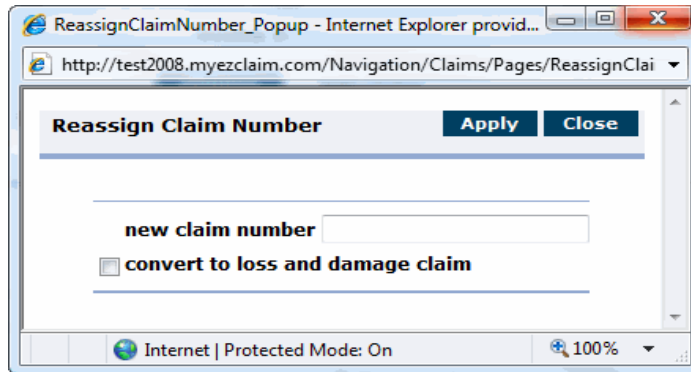
2. Click the **Reverse** button. The Reverse Claim Dialog opens.

3. Accept the **System Generated** claim number *or* select **User Assigned** and enter your claim number. By default, all reversed claims have claim numbers that start with CR.
4. In the Status field, select the status of the claim. By default, the status is set to Outstanding.
5. Click the **Apply** button. The claim window opens. On the Products tab, the Product Qty and Line Total show negative amounts. The Freight Amt and Add'l Amt show negative amounts. The Diary tab also contains an entry indicating what claim was reversed.

## CHANGING A CLAIM NUMBER

myEZClaim allows for changing the claim number of an existing claim. The new claim number must be a unique number.

1. Open the claim that needs the claim number changed.
2. Click the **Reassign** button next to the claim number. The **Reassign** dialog opens.



3. In the **new claim number** box, enter the new claim number. The claim number must be unique.
4. Depending on the claim type, you may be able to convert the claim to a different claim type. A Vendor claim can be converted to Loss and Damage claim. A Loss and Damage Claim can be converted to a Vendor claim. Overcharge claims and Return Authorizations cannot be converted to a different claim type. To convert a claim, place an x in the **Convert to** box.
5. Click the **Apply** button. The dialog closes. The claim number is changed. A message is entered into the claim's Diary stating that the claim number has been changed.

## **E-MAILING CLAIMS AND DOCUMENTS**

myEZClaim allows you to e-mail claims at anytime. You can send e-mails with high or low importance, add supporting documentation to the e-mail, and even zip the attachments.

1. Open the claim you want to e-mail. The Claim Properties window opens.
2. Click the **EMAIL** button. The **Email Message** dialog box opens.

myEZClaim® Email Properties - Internet Explorer provided by Dell

http://test2008.myezclaim.com/Navigation/Claims/Pages/Email\_Popup.aspx?claimId=7765&subject=Outstanding+Clair

**myEZClaim® Email Message** [Send] [Close]

Please enter valid email addresses, i.e. "name@company.com", separated with a comma or semicolon.

**Recipients** **Company** **Claimant** **Carrier** **Consignee** **Shipper**

**to...:**

**cc...:**

**bcc...:**

from: noreply@myezclaim.com

subject: Outstanding Claim #LD1000000119; Demotronics

0 Attachment [ 0.00 MB ]

☒ Attach Claim

☒ Attach Claim Documents

☐ Attach Claim Diaries Report

☐ Zip Attachments

☐ Request Confirmation

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3. You can type the e-mail addresses in the To, CC:, and BCC boxes or click one of the buttons to select an email address from the list.
  - **Recipients** button. Click the **Recipients** button to select an address. The Recipients dialog box opens. This dialog box has a listing of all email addresses entered as Recipients. (See "Working with E-mail Recipients" for more information.)
  - **Company** button. Click the **Company** button to select an address. The Recipients dialog box opens. This dialog box has a listing of the **contact email** addresses entered for Companies.
  - **Claimant** button. Click the **Claimant** button to select an address. The Recipients dialog box opens. This dialog box has a listing of the **contact email** addresses entered for Claimants.
  - **Carrier** button. Click the **Carrier** button to select an address. The Recipients dialog box opens. This dialog box has a listing of the **contact email** addresses entered for Carriers.
  - **Consignee** button. Click the **Consignee** button to select an address. The Recipients dialog box opens. This dialog box has a listing of the **contact email** addresses entered for Consignees.
  - **Shipper** button. Click the **Shipper** button to select an address. The Recipients dialog box opens. This dialog box has a listing of the **contact email** addresses entered for Shippers.

Click the appropriate check boxes for the people you want to send the e-mail to. If you accidentally select the wrong e-mail address, just click the box to remove the check mark.

Click the Save button to return to the **Email Message** dialog box.

4. By default, the **From** field has an email address already in it. If the people receiving the email should not reply to the email address shown, enter a corrected email address.
5. Enter a subject in the **Subject** field. By default, a subject message is already generated with the claim number and the name of the company from the claim.

6. To send this e-mail with high importance, click the exclamation mark button.



7. To send the e-mail with a low importance, click the down arrow button.



8. To request a delivery receipt, click the mail button.



9. Click the Flag button to flag the e-mail as a reply, forward, etc.



The **Message Flags** dialog box opens. Select the appropriate flag and then click **Save** to return to the e-mail.



**NOTE:** If you are not certain as to what a button is for, just move the mouse pointer over the button. A ToolTip will be displayed with a description of the button.

10. By default, **Attach Claim** is checked. If you do not want to e-mail the claim, click to the check box to remove the check mark.
11. By default, **Attach Claim Documents** is checked. If you do not want to e-mail the claim documents, click to the check box to remove the check mark.
12. Click the box next to **Zip Attachments** to have the attachments e-mailed in a zipped format. Some companies have size limits for e-mails. Zipping the attachments may be the only way around this size limitation.
13. By default, **Request Confirmation** is checked. If you do not want to have receipt of the claim acknowledged, click to the check box to remove the check mark. By checking this box, the person(s) receiving this email will receive a link to confirm receipt of the claim online. This information will be recorded in the Diary section along with the name of the person who acknowledged receipt of the claim. This option is not shown if the claim has already been acknowledged.
14. To add additional documents, click the paper clip button. The **File Attachments** dialog box opens. Click the **Browse** button to locate the file. Once the file is located, select it and then click the **Open** button. Click the **Attach** button to attach the file and then click the **Save** button to return to the e-mail.
15. Enter a note for the e-mail in the big box below the attachments.
16. Click the **Send** button to send the e-mail. If this is the first time that the claim has been emailed, the **mailed date** on the **Activities** tab will show the date that the claim was emailed. The **Diary** tab on the claim is updated with information regarding the email.

### **CLAIM CONFIRMATION**

myEZClaim allows you to send claims to a carrier and allows the carrier to confirm receipt of the claim online. This information is then recorded into the claim's diary.

1. Open the claim you want to e-mail. The Claim Properties window opens.
2. Click the **EMAIL** button. The **Email Message** dialog box opens.

myEZClaim® Email Properties - Internet Explorer provided by Dell

http://test2008.myezclaim.com/Navigation/Claims/Pages/Email\_Popup.aspx?claimId=7765&subject=Outstanding+Claim

**myEZClaim® Email Message** [Send] [Close]

Please enter valid email addresses, i.e. "name@company.com", separated with a comma or semicolon.

**Recipients** **Company** **Claimant** **Carrier** **Consignee** **Shipper**

**to...:**

**cc...:**

**bcc...:**

from: noreply@myezclaim.com

subject: Outstanding Claim #LD1000000119; Demotronics

[!][v][e][p]

**0 Attachment [ 0.00 MB ]** [u]

☒ **Attach Claim**

☒ **Attach Claim Documents**

☐ **Attach Claim Diaries Report**

☐ **Zip Attachments**

☐ **Request Confirmation**

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3. Check the box next to **Request Confirmation** to have receipt of the claim acknowledged. This option is not shown if the claim has already been acknowledged. By checking this box, the person(s) receiving this email will receive a link to confirm receipt of the claim online.
4. Complete the email as usual.

The person who you sent an email to will receive an email similar to the one shown below:



When they click the link, they are taken to a page to acknowledge the receipt of the claim:

**myEZClaim® Acknowledge Claim**

To complete the Claim Acknowledgement process, please enter you first and last name below then click the Submit button

first name:

last name:

comments:

your email address:

The carrier only needs to enter in their first name and last name and then click **Submit**. A thank you dialog will be shown when they have completed the confirmation. If the claim has already been confirmed, a message will be shown stating who confirmed the claim.

Once the claim has been confirmed, the Diary tab on the claim will be updated with who acknowledged the receipt of the claim, any comments entered, and the date it was acknowledged. The Acknowledgement Date will also be filled in on the Activities tab.

SHIPPING PRODUCTS		CREDIT/DEBIT	DOCUMENTS	ACTIVITIES	DIARY	PAYMENTS	CLAIM TASKS	SUBROGATION
date of	updated by		comments					
7/17/2007	myEZClaim® Administrator		Claim acknowledged by John Smith					
7/17/2007	myEZClaim® Administrator		An s was union@gmail.com Subject: standing Cl 0000001					

## PROCESSING FOLLOW-UP LETTERS

You can generate follow-up letters for claims that are 30 days, 60 days, 90 days and 120 days past the date on which the original claim was filed. You can generate the follow-up letters at any time. Letters are only generated for those claims that meet the following criteria:

- Do not have an Activity recorded for the # **Day Letter** (where # is the appropriate time period)
- Are the indicated number of days past the **Mailed Date**
- Have a status of **OUTSTANDING**.

MyEZClaim generates a new letter only if it hasn't been previously generated. MyEZClaim can keep track of the forms and letters that have been generated when you batch process your claims.

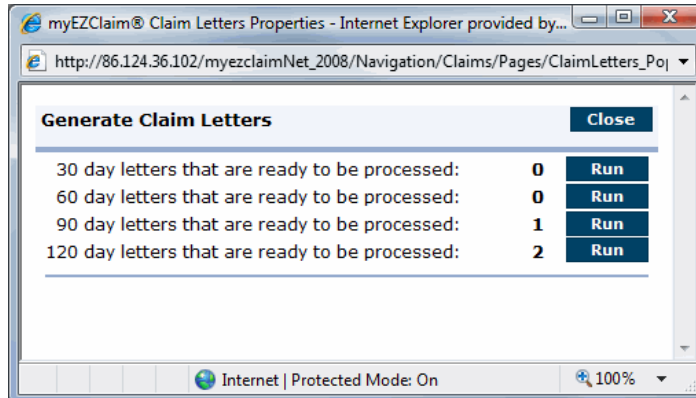
The following is a list of the follow-up letters that you can generate. Each of these, with the exception of the Open Claim Reminder Letters, prompt you to update the database. The Open Claim Reminder Letters can be printed as many times as you feel is necessary; the database does not require an update for this letter.

- 30-Day Letters
- 60-Day Letters
- Open Claim Reminder Letters
- 90-Day Letters
- 120-Day Letters

## GENERATING FOLLOW-UP LETTERS

The instructions provided in this section are the same for 30 day, 60 day, 90 day, 120 day follow-up letters, and general letters. Simply click the **Run** button next to the appropriate letter to be generated.

1. Click the **Claims** group tab.
2. Click the **Claim Letters** shortcut. The **Generate Claim Letters** dialog box opens.

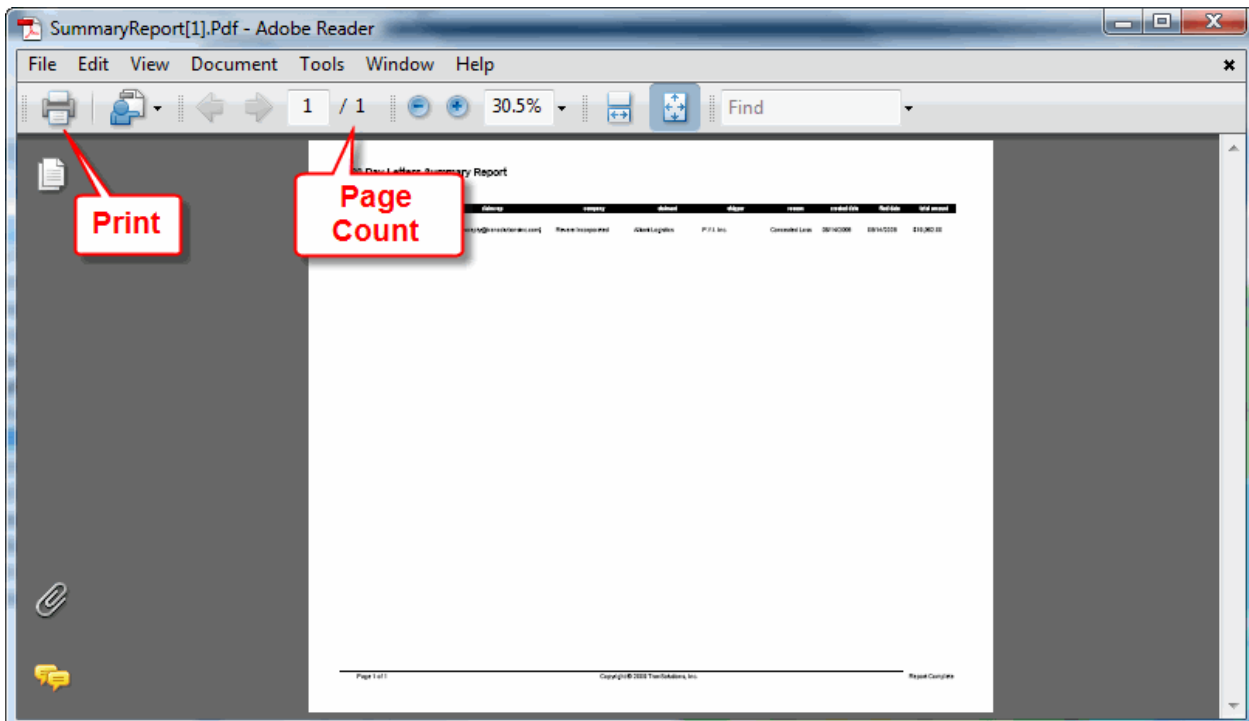


If there are no claims requiring follow-up letters for that time period, you will see a “0” next to the **Run** button for the appropriate letter.

3. Click the **Run** button next to the appropriate letter to generate the letters.

## PRINTING GENERATED FORMS AND LETTERS

1. From the Claims page, click the **Claim Letters** shortcut. The **Generate Claim Letters** dialog box opens.
2. Click **Cancel** to close the dialog box.
3. Click the **View** button next to the claim(s) you want to print. The letter or form opens in PDF format.



4. You can view your letter or form, save it, or print it.
  - ▣ To save the form or letter, from the File menu click Save a Copy. Enter a name for the file and then click **Save**.
  - ▣ To print the form or letter, click the print button, and click **OK**.



# RETURN AUTHORIZATIONS

# 3

MyEZClaim allows you to enter and track return authorizations. Once you have completed the “Getting Started” section of the User’s Guide, you’re ready to begin entering return authorizations. If you have a return authorization that involves a lookup value that you haven’t yet entered, you need to enter that information first and then enter your return authorization. You do not have to enter your businesses or products before your returns; you can enter new businesses and products from within the return authorization form.

Processing return authorizations involves several steps. You need to first enter your returns. After entering your returns, you generate the forms to be sent. Finally, as you receive additional information, you update your returns to reflect these events.

The following is an overview of the steps involved in return authorization processing:

- Entering Returns
- Generating Return Authorization Forms
- Entering Return Updates

## ENTERING RETURN AUTHORIZATIONS

The information you enter for return authorizations is used when you generate the return authorization form.

1. Click the **Claims** group tab. The Claims page opens.
2. Click the **New Claim** button. The **Create a New Claim** dialog box opens.

myEZClaim® Create Claim - Internet Explorer provided ...

http://86.124.36.102/myezclaimNet\_2008/Navigation/Claims/Pages/Cre

**Create a New Claim** [Apply] [Close]

select the claim type:

☒ loss and damage    ☐ overcharge

☐ return authorization    ☐ vendor

this is a Pending claim:

☐ (Checked = True : Unchecked = False)

select the claim number: (optional)

☒ system generated    claim prefix: LD

☐ user assigned    [ ]

Internet | Protected Mode: On    100%

3. Select the **Return Authorization** option.
4. Accept the **System Generated** claim number *or* select **User Assigned** and enter your claim number.

## RETURN AUTHORIZATIONS

### Entering Return Authorizations

5. Click the **Apply** button. The claim window opens.

myEZClaim® Return Authorization Properties - Internet Explorer provided by Dell

http://test2008.myezclaim.com/Navigation/Claims/Pages/ReturnAuthorization\_Popup.aspx?claimType=4&numberType=1&claimNumber=RA&isPODClaim=False

**Return Authorization - RA Number: (pending)** **Delete** **Save** **Print** **Email** **Reassign** **Convert** **Close**

<b>Company</b>	claim rep: Andy Test	status: Outstanding
<b>Claimant</b>	<b>Carrier</b>	carrier claim #: <input type="text"/>
address: <input type="text"/>	address: <input type="text"/>	bol carrier: <input type="text"/>
<b>Reason</b>	delivery carrier: <input type="text"/>	bol date: <input type="text"/>
claim group: <input type="text"/>	invoice #: <input type="text"/>	delivery date: <input type="text"/>
<b>Consignee</b>	<b>Shipper</b>	PO number: <input type="text"/>
address: <input type="text"/>	address: <input type="text"/>	internal claim#: <input type="text"/>
		in/out: <input type="text"/>
		trans mode: <input type="text"/>
acct rec #: <input type="text"/>	requester name: <input type="text"/>	vehicle #: <input type="text"/>
domestic/international: Domestic	recovery amt: <input type="text"/>	seal#: <input type="text"/>
document origin: <input type="text"/>	cost center: <input type="text"/>	seal intact: <input type="text"/>
ship to: <input type="text"/>	3rd party bill to: <input type="text"/>	return PRO #: <input type="text"/>
<input type="text"/>	<input type="text"/>	date requested: 8/15/2009
<input type="text"/>	<input type="text"/>	date filed: 8/15/2009
		cycle time: 0 days
		updated: <input type="text"/>
return carrier: <input type="text"/>	contact name: <input type="text"/>	
preferred return carrier: <input type="text"/>	contact ph#: <input type="text"/>	
	contact fax#: <input type="text"/>	
	date available for pick up: <input type="text"/>	
	hours available for pick up: <input type="text"/>	
<a href="#">additional claim information</a>	was original a dropship: Yes	
shipped from: <input type="text"/>	replacement sold: <input type="text"/>	invoice amt: 0
freight amt: 0.00	add'l charges: 0.00	total amt: 0.00
		outstanding amt: 0.00
		<b>Apply</b>
		Currency USD

Internet | Protected Mode: On 100%



**NOTE:** The Claim Number is not assigned until the claim is saved.

- Click the **Company** button. The **Find Company** dialog box opens.

If the Region is incorrect, select a different region from the list. By default, the region you are working in is in the **Find Region** box.

If you would like to see all companies, not just the companies in your list, click to remove the check mark in the **Use My Company** box and click the **Find** button.

Select the company responsible for filing the claim from the list and click the **Apply** button to return to the claim form. *This information is required to save a claim.*

If the company does not exist, you can create a new company record by clicking the **Add** button. The **New Company** dialog box opens, allowing you to enter a new Company. Enter the new information and click **Save** to return to the claim form.

- The Claim Rep's name is automatically populated based on your login. The **Claim Rep** is the person responsible for following up with the carrier. If you are modifying a claim or entering new data, select your name from the list in the **Claim Rep** box. *This information is required to save a claim.*
- The **Status** box displays the default of **OUTSTANDING**.

## RETURN AUTHORIZATIONS

### Entering Return Authorizations

- Click the **Claimant** button. The **Find Claimant** dialog box opens.

The screenshot shows the 'Find Claimant' dialog box in an Internet Explorer window. The title bar reads 'MyEZClaim® Find Claimant - Internet Explorer provided by Dell'. The address bar shows 'http://86.124.36.102/MyEZClaimNet\_2008/Navigation/My%20Account/Pages/Find\_Popup.asp'. The dialog box has a header with 'Find Claimant' and buttons for 'Find', 'Add', and 'Close'. Below the header, there are search criteria fields: 'Field to search:' with a dropdown set to 'Full Name', a text box for 'Find criteria:', 'Max records:' set to '30', and 'Find region:' with a dropdown set to 'NORTH'. A checkbox for 'Use My Claimant' is unchecked. Below these fields, there are two claimant entries. The first entry shows 'Claimant: ABC Logistics Inc.', 'Contact: Anne Smith', and 'Address: 1231 S. A Street, Corvallis, OR 97623' with an 'Apply' button. The second entry shows 'Claimant: Bay Logistics Inc.', 'Contact: John Larsen', and 'Address: 9356 W. Any Street, Anyplace, CA 90310' with an 'Apply' button. The status bar at the bottom indicates 'Internet | Protected Mode: On' and '100%' zoom.

If the Region is incorrect, select a different region from the list. By default, the region you are working in is in the **Find Region** box. If you would like to see all claimants, not just the claimants in your list, click to remove the check mark in the **Use My Claimant** box.

Select the appropriate business from the **Claimant** list and click the **Apply** button to return to the claim form. ***This information is required to save a claim.***

If the Claimant is not in the list, click the **Add** button. The **New Claimant** dialog box opens, allowing you to enter a new Claimant. Enter the new information and click **Save** to return to the claim form.

- Click the **Reason** button. The **Find Reason** dialog box opens.

The screenshot shows the 'Find Reason' dialog box in an Internet Explorer window. The title bar reads 'MyEZClaim® Find Reason - Internet Explorer provided by Dell'. The address bar shows 'http://86.124.36.102/MyEZClaimNet\_2008/Navigation/My%20Account/Pages/Find\_Popup.asp'. The dialog box has a header with 'Find Reason' and buttons for 'Find' and 'Close'. Below the header, there are search criteria fields: 'Field to search:' with a dropdown set to 'Reason Code', a text box for 'Find criteria:', 'Max records:' set to '30', and a checkbox for 'Use My Reason' which is unchecked. Below these fields, there is a list box containing the following reasons: 'Accident', 'Cancelled Damage', 'Carton Damage Only', 'd1', 'Damage', 'Delay', 'dsdasdsad', 'Freight Charges', 'Loss - Full', 'Loss - Partial', 'Lost Shipment', 'Missing Skid', and 'Other (Unknown)'. An 'Apply' button is located below the list box. The status bar at the bottom indicates 'Internet | Protected Mode: On' and '100%' zoom.

11. Find the reason that best describes why the claim is being filed from the list and click the **Apply** button. *This information is required to save a claim.*
12. If your company has different groups that handle claims, select your claim group from the **Claim Group** list. If the list is empty, you can skip this step.
13. Click the **Carrier** button. The **Find Carrier** dialog box opens.

If the Region is incorrect, select a different region from the list. By default, the region you are working in is in the **Find Region** box. If you would like to see all carriers, not just the carriers in your list, click to remove the check mark in the **Use My Carriers** box.

Select the carrier who was responsible for this shipment from the **Carrier** list and click the **Apply** button to return to the claim form. *This information is required to save a claim.*

If the Carrier is not in the list, click the **Add** button. The **New Carrier** dialog box opens, allowing you to enter a new Carrier. Enter the new information and click **Save** to return to the claim form.

14. Enter the name of the 3<sup>rd</sup> party delivery carrier, if applicable, in the **Delivery Carrier** box.
15. Enter the invoice number in the **Invoice #** box.
16. The **Carrier Claim #** is assigned by the carrier and provided when they acknowledge the claim. (See “Updating Return Authorizations” for more information.)
17. Enter the carrier’s bill-of-lading number in the **BOL Carrier** box. If another claim exists with the same BOL number, you will receive a message indicating that the BOL already exists. You have the option to save the claim with a duplicate BOL number, or return to the claim and modify the number.
18. Enter the date of the bill-of-lading in the **BOL Date** box or click the **Calendar** button and select the date from the calendar.

## RETURN AUTHORIZATIONS

### Entering Return Authorizations

19. Enter the date on which the delivery was made in the **Delivery Date** box or click the **Calendar** button and select the date from the calendar.
20. Enter the purchase order number in the **PO Number** box.
21. Click the **Consignee** button. The **Find Consignee** dialog box opens.

The screenshot shows a web browser window titled "MyEZClaim® Find Consignee - Internet Explorer provided by Dell". The address bar shows the URL: [http://86.124.36.102/MyEZClaimNet\\_2008/Navigation/My%20Account/Pages/Find\\_Popup.asp](http://86.124.36.102/MyEZClaimNet_2008/Navigation/My%20Account/Pages/Find_Popup.asp). The dialog box has a title bar "Find Consignee" and three buttons: "Find", "Add", and "Close".

Field to search:    
The "\*" (asterisk) can be used for a wild card search in your criteria.

Find criteria:

Max records:

Find region:

Use My Consignee ☐ (Checked = True : Unchecked = False)

Consignee: Demo - Customer [CU-001]  
Contact: First LastName  
Address: 123 Main Street  
Cleveland, OH 44110  
UNITED STATES

Consignee: HM Industries  
Contact:  
Address: 123 W. Maya Street  
Milwaukee, MN  
53201

The browser status bar at the bottom shows "Internet | Protected Mode: On" and a zoom level of "100%".

Select the consignee from the **Consignee** list and click the **Apply** button. *This information is required to save a claim.*

If you would like to see all consignees, not just the consignees in your list, click to remove the check mark in the **Use My Consignee** box.

If the Consignee is not in the list, click the **Add** button. The **New Consignee** dialog box opens, allowing you to enter a new Consignee. Enter the new information and click **Save** to return to the claim form.

22. Click the **Shipper** button. The **Find Shipper** dialog box opens.

If the Region is incorrect, select a different region from the list. By default, the region you are working in is in the **Find Region** box.

Select the shipper from the **Shipper** list and click the **Apply** button to return to the claim form. *This information is required to save a claim.*

If you would like to see all shippers, not just the shippers in your list, click to remove the check mark in the **Use My Shipper** box.

If the Shipper is not in the list, click the **Add** button. The **New Shipper** dialog box opens, allowing you to enter a new Shipper. Enter the new information and click **Save** to return to the claim form.

23. Move to the **Internal Claim #** box and enter the number.
24. Move to the **In/Out** box and select the option that best indicates the shipment type.
25. Move to the **Trans Mode** box and select the method of transportation.
26. Move to the **Acct. Rec #** box and add the A/R ledger number assigned to the claim by accounting for the carrier receivable.
27. Move to the **Domestic/International** box and select the type of shipment. By default, this is set to Domestic. *This information is required to save a claim.*
28. Move to the **Document Origin** box and enter the origin of the claim documentation.
29. Enter the address for the shipment in the **Ship To** boxes.
30. Move to the **Return Carrier** and enter the carrier's name.
31. Move to the **Preferred Return Carrier** and enter the preferred carrier's name.
32. The **Additional Claim Information** link allows you to enter more information for the claim. This link is not active until after the claim is saved.
33. Move to the **Requester Name** box and enter the name of the person or organization requesting the claim.

34. Move to the **Recovery Amt** box and enter the anticipated claim recovery.
35. Move to the **Cost Center** box and enter the cost center responsible for the claim.
36. Move to the **3rd Party Bill To** box. Enter the 3rd party information.
37. Enter the contact information in the **Contact Name**, **Contact PH#**, and **Contact Fax#**.
38. Move to the **Date Available for Pickup** box and enter the date that the return items can be picked up.
39. Move to the **Hours Available for Pickup** box and enter the time frame that the return items can be picked up.
40. Move to the **Was Original a Drop Ship** box and select Yes or No. By default, Yes is selected.
41. Move to the **Vehicle #** box and enter the number. The vehicle number can be the container or trailer box number.
42. Move to the **Seal #** box and enter the number.
43. Move to the **Seal Intact** box and enter the information.
44. In the **Return Pro#** box, enter the return number.
45. Move to the **Date Requested** box and click the calendar button and select the date. *This information is required to save a claim.*
46. Move to the **Date Filed** box and click the calendar button and select the date filed. *This information is required to save a claim.*
47. The **Cycle Time** box contains the number of days from the date requested to the date filed. The number of days is system generated and cannot be modified. There is no date until the claim is saved.
48. The **Updated** box contains the date the claim was last modified. The date is system generated and cannot be modified. There is no date until the claim is saved.
49. Move to the **Shipped From** box and enter the shipment origination.
50. Move to the **Replacement SOID** and enter the information.
51. Move to the **Invoice Amt** box and enter the amount of the invoice. By default, the amount is "0".



**NOTE:** Save the claim by clicking the Save button. You will not be able to add the Shipping Products, Additional Charges, Documents, Activities, Diary, or Claim Tasks until the claim is saved.

Continue with the following steps to enter any required information in the **Shipping Products**, **Add'l Charges**, **Documents**, **Activities** and **Diary** tabs.

### SHIPPING PRODUCTS TAB

The **Shipping Products** tab contains all of the product information related to this claim. There are three different ways to add product information to the claim. You can use the **Add Product** button, **Paste Products** button, or the **Multiple Products** button.

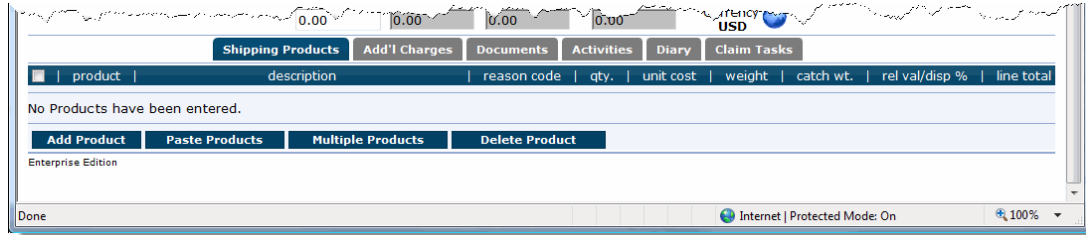


**NOTE:** You must enter at least one product before printing or emailing the Return Authorization Form. Documents are also required.

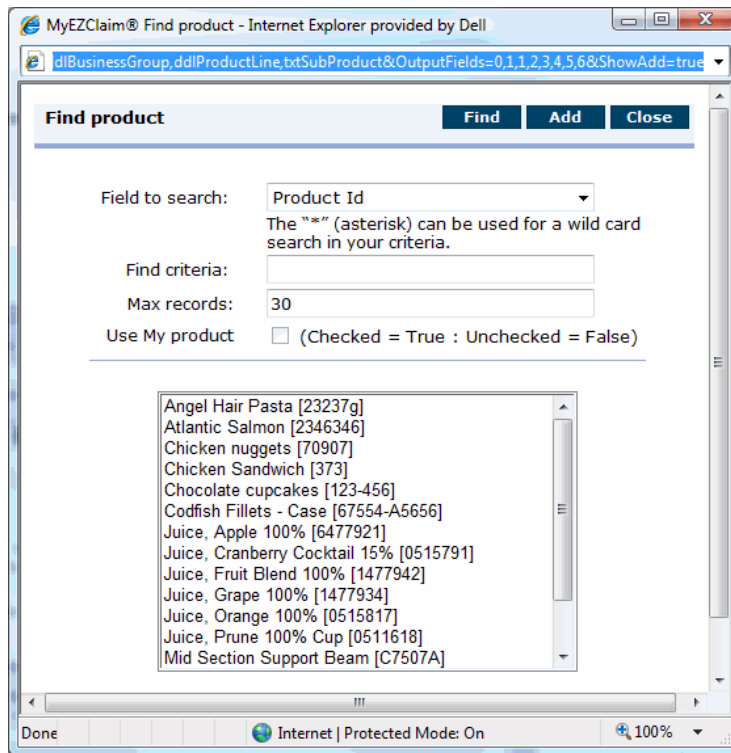


## Using the Add Product Button

1. From the Claim Properties page, select the **Shipping Products** tab.



2. Click the **Add Product** button to add a new product to the claim. The **New Product** dialog box and the **Find Product** dialog opens.



3. From the **Product** list, double-click the product for which the claim is being issued. The product's price and weight are copied into the **Price** and **Weight** boxes, respectively. ***This information is required to save a claim.***  
If you would like to see all carriers, not just the carriers in your list, click to remove the check mark in the **Use My Carriers** box.  
If the Product is not in the list, click the **Add** button. The **New Product** dialog box opens, allowing you to enter a new product. Enter the new information and click **Save** to return to the claim.  
(See "Adding a Product to the Product List" for more information.)
4. In the **Quantity** box enter the quantity of the product involved in the claim.
5. If the unit price is different from that shown in the **Price** box, enter the correct price.

6. If the weight is different from that shown in the **Weight** box, enter the correct weight for a single unit/case of the selected product. If you are using the Release Value method for the line item calculation you must enter a weight.
7. Move to the **Sub Product** box and enter any additional product information.
8. Move to the **Receiving Doc ID** box and enter the doc ID.
9. Move to the **Merchandise ID** box and enter the ID.
10. In the **Shipped** and **Received** boxes, enter the information.
11. In the **Import (Y/N)** box, select whether or not the product was an import.
12. By default, the reason code matches the reason code selected for the claim. If this is not correct, select a reason code from the **Reason Code** list.
13. Move to the **Serial Number** box and enter the serial number.
14. Move to the **Invoice Number** and enter the invoice number.
15. Move to the **Sales Order Number** box and enter the sales order number.
16. The **Business Group** and **Product Line** default to what is configured on the Product. If this information is not correct, select the business group and product line from the list.



**NOTE:** You can calculate the line item total using either the Product Disposition method or the Release Value method.

#### ☐ **Product Disposition Method**

By default, the Disposition Method is calculated as (Quantity \* Price) \* Disposition Percentage. The disposition method can be calculated as (Price \* Weight) \* Disposition Percentage by checking the **Catch Wt. Calc.** check box under the **Weight** box.

- a) Select the **Disposition** option. The **Disposition** list is enabled.
- b) Select the appropriate product disposition and discount from the **Disposition** list.

If you need a disposition that is not in the list, you need to close the **New Product** dialog box – you must enter a quantity if you want the product information to be saved with the claim.

- c) If the disposition discount needs to be modified, move to the **Percent** box and enter a new percent discount. A line-item total is displayed in the **Line Total** box. This is the product of the **Quantity** and the **Price**, less the discount (either from the **Disposition** or the **Percentage** box).

#### ☐ **Release Value Method**

- a) Select the **Release** option. The **Release** list is enabled.
- b) Select the appropriate release value and rate from the **Release** list.

If you need a release value that is not in the list, you need to close the **New Product** dialog box – you must enter a quantity if you want the product information to be saved with the claim.

- c) If the release value rate needs to be modified, move to the **Release Value** box and enter a new release value. A new **Line Total** is calculated. This is the product of the **Quantity** and **Weight** and **Release Value**.
17. If you have multiple products to add, click **Save & Add New** to keep adding products. If this is the last product to be added to the claim, click the **Save** button to return to the Claim Properties window.
18. If there are any applicable discounts, enter the value in the **Discount Amt** box.
19. Enter any applicable freight charges in the **Freight Amt** box.

20. If there are any other applicable charges to include on the claim form, enter the charges on the **Add'l Charges** tab. These charges will be totaled in the **add'l charges** box. The Add'l Amt is for display only, you cannot manually modify this value.
21. The **Total Amt** is calculated based on the products listed, minus any values listed in the **Reimbursement Amt**, **Write-Off Amt**, and **Discount Amt** boxes. The Total Amt also adds any charges added in the Freight Amt and Add'l Charges boxes. The **Total Amt** box is for display only, you cannot manually modify this value.  
The **Outstanding Amt** is calculated by the **Total Amt** minus any payments made. The Outstanding Amt is for display only, you cannot manually modify this value.
22. The currency is shown in USD. To change the currency, click the **Globe** icon and select a different currency.



**NOTE:** Any additions or changes to the Shipping Products information are NOT cancelled by clicking the Cancel button in the Claim Properties window (this does not include the Reimbursement Amt, Write-Off Amt, Discount Amt, Freight Amt, and Other Amt). You must manually undo any modifications you've made in this section.

### Using the Paste Products Button

The **Paste Products** button is available to allow SAP users to copy product information from your SAP screen and paste the part number and Quantity to the products screen. From the Claim Properties page, click the **Paste Products** button. The **Copy & Paste Products** dialog box opens. You can copy the products from the SAP screen (only the part number and quantity) and paste to the screen. Edit the screen for the correct part number and quantity.

### Using the Multiple Products Button

The **Multiple Products** button is available to allow you to add multiple products all at once. You can copy and paste the information from another screen or just type in the information. From the Claim Properties page, click the **Multiple Products** button. The **New Product** dialog box opens. Enter the information and then **Save** to return to claim.



**NOTE:** When using the **Multiple Products** to input your products for the claim, the **Reason Code** does not default to the selected Reason code for the claim.

### ADD'L CHARGES TAB

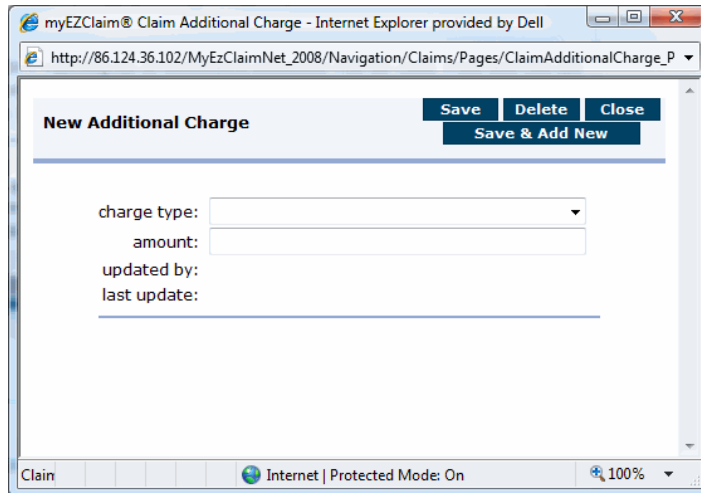
The **Add'l Charges** tab contains information regarding additional charges associated with the claim. From here you can enter any additional charges associated with the claim such as restocking fees.

1. From the Claim Properties window, select the **Add'l Charges** tab.

2. Click the **Add Charges** button. The **New Additional Charge** dialog box opens.

## RETURN AUTHORIZATIONS

### Entering Return Authorizations



The screenshot shows a web browser window titled "myEZClaim® Claim Additional Charge - Internet Explorer provided by Dell". The address bar shows the URL "http://86.124.36.102/MyEZClaimNet\_2008/Navigation/Claims/Pages/ClaimAdditionalCharge\_P". The main content area is titled "New Additional Charge" and contains the following fields and buttons:

- Buttons: Save, Delete, Close, Save & Add New
- charge type: [dropdown menu]
- amount: [text input box]
- updated by: [text input box]
- last update: [text input box]

The status bar at the bottom shows "Internet | Protected Mode: On" and "100%".

3. Select the **Charge Type** from the list.
4. Move to the **Amount** box and enter the charge amount.
5. If you have more charges to enter, click the **Save & Add New** button. This will save the charge to the claim and open another New Additional Charge dialog box.

If you have no more charges to enter, click the **Save** button to return to the claim.

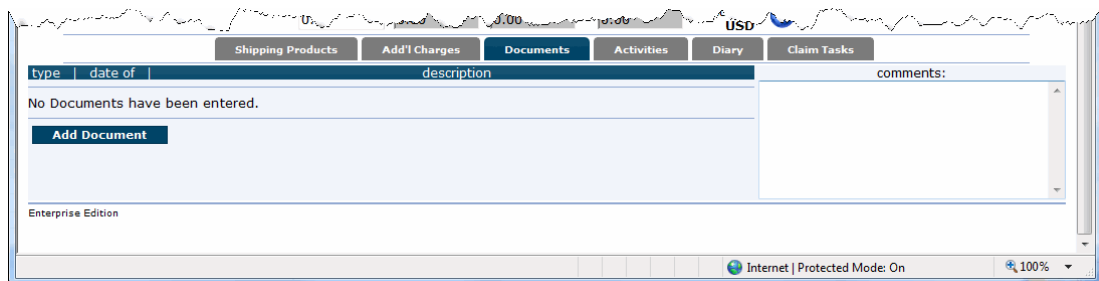
### DOCUMENTS TAB

The **Documents** tab contains information regarding the documentation associated with the claim. From here you can enter the Freight Bill Pro # (this is used as the Pro Number/Airway Bill Number on claim letters and forms), claimant reference numbers, inspection reports, etc. You also have the ability to attach documents to the claims from here.



**NOTE:** You must enter the following documents in order to print or email the Return Authorization Form: Loss or Damage Claim Form, Bill of Lading, and Purchase Order.

1. From the Claim Properties window, select the **Documents** tab.



The screenshot shows the "Documents" tab in a web application. The top navigation bar includes tabs for "Shipping Products", "Add'l Charges", "Documents" (selected), "Activities", "Diary", and "Claim Tasks". The main content area has a table with columns "type", "date of", "description", and "comments:". Below the table, it says "No Documents have been entered." and there is an "Add Document" button. The status bar at the bottom shows "Internet | Protected Mode: On" and "100%".

2. Click the **Add** button. The **New Document** dialog box opens.

myEZClaim® Claim Document - Internet Explorer provided by ...  
http://86.124.36.102/myezclaimNet\_2008/Navigation/Claims/Pages/Document

**New Document** Save Delete Close  
Save & Add New

document type:   
document id:   
date of: 12/29/2008   
file name:   
updated by:   
last update:  Attach View

Internet | Protected Mode: On 100%

3. Select the **Document Type** from the list.
4. Move to the **Document ID** box and enter the document ID.
5. Move to the **Date Of** box. If the date is not correct, you can enter a new date.  
OR click the **Calendar** button to select the date from the calendar.
6. Click the **Save** button when you are done. If you are not going to attach a document, click the **Close** button to return to the claim.
7. Click the **Attach** button to attach the document to the claim if applicable. The **File Attachment** dialog box opens.

myEZClaim® Add File Attachment - Internet Explorer pr...  
http://test2008.myezclaim.com/Navigation/Claims/Pages/FileAttachm

**myEZClaim® File Attachment** Save Close

☒ From Disk ☐ From Outlook

Click **Browse** to select the file, or type the path to the file in the box below. Click **Save** when you are finished.

Browse...

Internet | Protected Mode: On 100%

8. You can attach files by using the **From Disk** or **From Outlook** options.  
If you are attaching **From Disk**,
  - Click the **Browse** button. The **Choose File** dialog box opens.
  - Locate and select the document you want to attach to the claim.
  - Click the **Open** button to return to the **File Attachment** dialog box.
  - Click the **Save** button to return to the **New Document Dialog** box.

If you are attaching **From Outlook**,

- Select the **From Outlook** radio button
- Click the **Get Emails** button.

- Locate and select the email document you want to attach to the claim.
- Click the **Save** button to return to the **New Document Dialog** box.



**NOTE:** Any comments entered in the Comments box will be printed on the return authorization form.

## ACTIVITIES TAB

The **Activities** tab contains information that helps you track the status of the claim.

If you have contacted the carrier to inform them of your intent to file a claim, you should add the Notice of Intent.

1. From the Claim Properties window, select the **Activities** tab.

2. Click the **Add Activity** button. The **New Activity** dialog box opens.

3. From the **Activity Type** list, select the applicable activity.
4. Move to the **Date Of** box. If the date is not correct, you can enter a new date.  
OR click the **Calendar** button next to select the date from the calendar.

The **Created By** box shows the person who last created or modified the activity. It is for display only, you cannot manually modify it.

The **Date Created** box shows the date of when the activity was created or last modified. It is for display only, you cannot manually modify it.

5. Click the **Save** button

Generally, you won't enter any other information in the **Activities** tab when first entering a claim. This information is entered when updating a claim. Some of the boxes in this tab are automatically updated. When the claim is created, the **Created Date** is filled with the current date. When you update a claim, the **Last Update** box is filled with the current date.



**NOTE:** Any changes made in Shipping Products, Documents, Activities, Diary, or Claim Tasks are NOT cancelled by clicking the Cancel button. You must manually undo any changes you've made in these sections.

## DIARY TAB

The **Diary** tab is used to add diary notes that help you keep track of the events associated with the claim.

1. From the Claim Properties window, select the **Diary** tab.

2. Click the **Add Diary** button to add a new diary note. The **New Diary Entry** dialog box opens.

3. If you want to change the date, enter a new date in the **Date Of** box.  
OR click the **Calendar** button and select the date from the calendar.
  4. Enter the comments you want to be saved with this claim.
  5. Click the **Save** button to return to the claim form. OR, click the **Close** button to not save the comments.
- You can delete a diary note by selecting the note and clicking the **Delete** button.



**NOTE:** You can print the *Claims with Diary* report by clicking the **Print** button.

## CLAIMS TASKS TAB

The **Claim Tasks** tab is used to keep track of tasks for the return authorization.

Generally, you won't enter any information in this tab when first entering a return authorization. This information is entered when updating a return authorization.

## UPDATING RETURN AUTHORIZATIONS

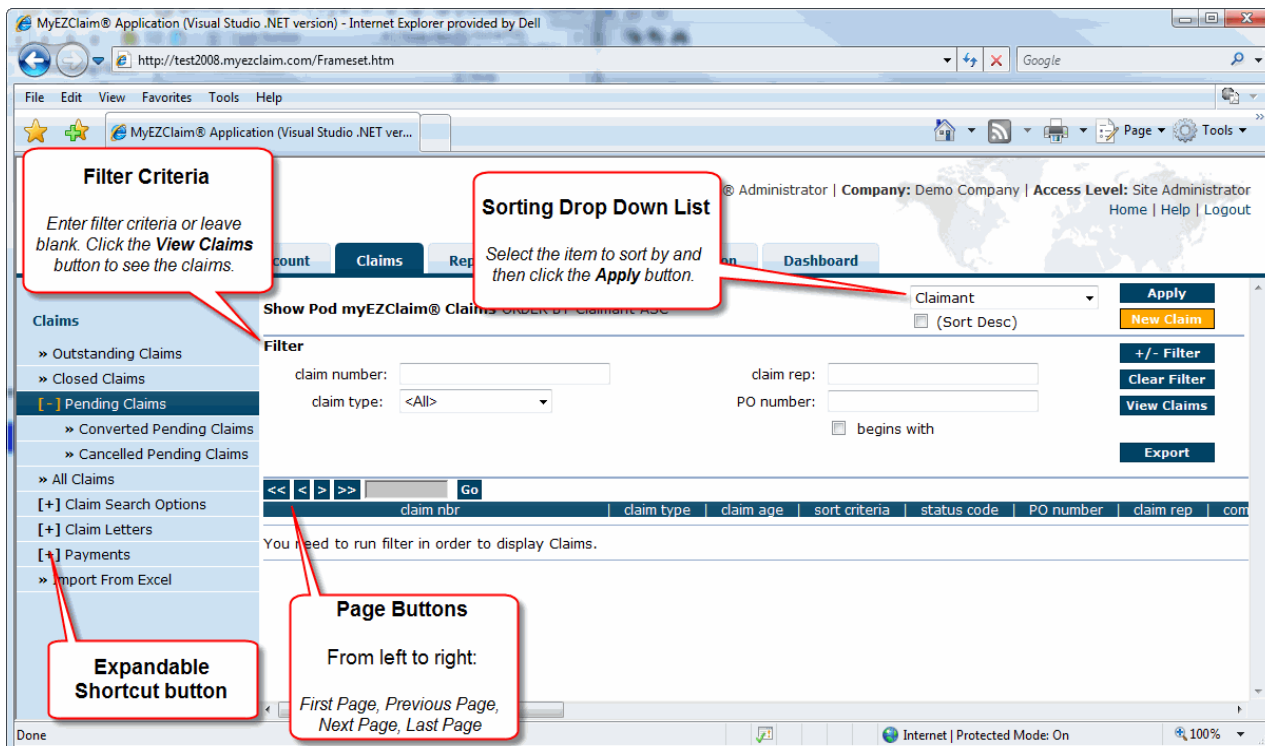
As you correspond with the carrier, and receive acknowledgements, you need to update the return authorization to indicate that these events have occurred. There may also be times when you need to make corrections to the information in the return authorization. The process of updating return authorizations is similar to that of creating a new return authorization, and can be done at any time.

The Claims page is set up so you can sort, organize, and update your claims and return authorizations as quickly as possible. By default, the claims and return authorizations are sorted by the claim number. You can sort the return authorizations just by selecting the item to sort by from the **Sorting** drop-down list and then clicking the **Apply** button.

You can also use the page buttons to quickly get to the desired record or use the filter to search by claim numbers, claim types, or claim reps.

If you don't want to filter your claims, you can click the **Run** button to get all of the claims for the selected shortcut.

The following is a description of the Claims page.





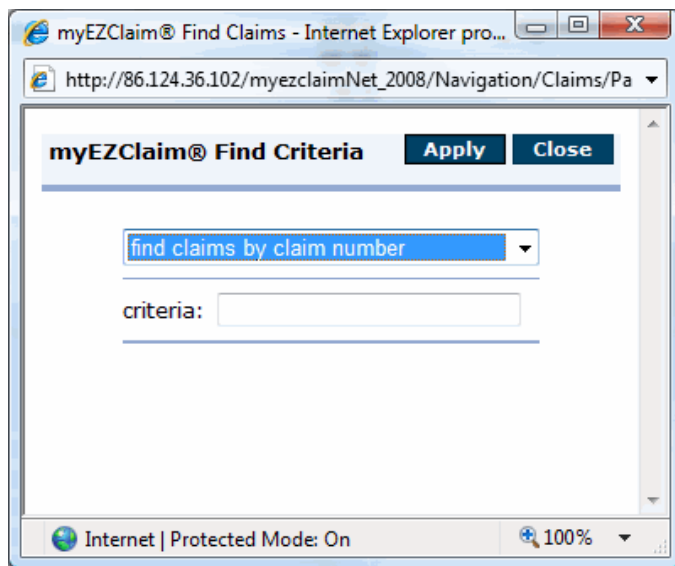
## OPENING A RETURN AUTHORIZATION

1. Click the **Claims** tab. The Claims page opens to Outstanding Claims.
2. Click the **View Claims** button to get a listing of all outstanding claims.
3. Locate and select the return authorization to be updated. The **Claim Properties** page opens.

## SEARCHING FOR A RETURN AUTHORIZATION

The search feature is very useful if you have many claims, outstanding or closed, and you don't want to scroll through the list. The search covers all claims, regardless of the claim status.

1. Click the **Claim Search Options** shortcut. The **Claims Search Options** expands showing a list of other options.
2. Click the **Find Claims** shortcut. The **Find Criteria** window opens. You can search for a claim by claim number, bill of lading date, bill of lading carrier, A/R reference number, freight bill pro#, or PO number.



3. Select one of the options from the drop-down menu.
4. In the **Criteria** box, enter the appropriate information.
5. Click the **Apply** button.

If a claim with the specified number, date, or carrier exists, the claim will be listed on the page. Otherwise, a message stating that the claims are not found will be shown.

## FILTERING THE CLAIM LIST

The filter feature can be used to perform comparison searches for claims. You can search for claims based on any field within a claim.

1. Click the **Claim Search Options** shortcut. The **Claims Search Options** expands showing a list of other options.
2. Click the **Filter View** shortcut. The **Filter Criteria** window opens.
3. From the **Field Name** list, select the field on which you want to filter.
4. From the **Operator** list, select the search operator you want to use.
5. Select the sort order desired (Ascending or descending).
6. Select the concatenation desired (And or Or). This allows you to filter for claims that meet several requirements. See examples.
7. Move to the **Criteria** box and enter the search criteria.
8. Click the **Add** button to add the item to the search criteria.
9. Click the **Run** button to return to the Filtered Claims List. All claims matching the search criteria are displayed. The filter search criteria is displayed in the current window banner.

### Examples:

To search for all of the claims that have a Claim ID that begins with **LD**, select **Claim Number** from the **Field Name** list, and select **like ("?" - single or "\*" - multiple)** from the **Operator** list, and then enter **LD\*** in the **Criteria** box. When you click the **Run** button, you are returned to the Claims page. Each claim that has a Claim ID that begins with the letters "LD" are displayed in the Claims page.

To search for claims that have been modified or created on 10/8/2006, select **Date Created** from the **Field Name** list and select **= (value is equal to)** from the **Operator** list, and then enter **10/8/2006** in the **Criteria** box. When you click the **Add** button, The search criteria is shown in the **Show me all claims where...** section. Select **Last Modified** from the **Field Name** list, then select **= (value is equal to)** from the **Operator** list, Select **Or for Concatenation** and then enter **10/8/2006** in the **Criteria** box. Click the **Add** button and then click the **Run** button. Each claim that has been last modified on or created on 10/8/2006 are displayed in the Claims page.

## UPDATING RETURN AUTHORIZATIONS

1. Click the claim to be updated. The **Claim Properties** window opens with the selected return authorization.

### Return Authorization Activities

#### *Acknowledgement*

2. If you received an acknowledgement for this return authorization, click the **Activities** tab and move to the **Acknowledged** box to enter the date on which you received the acknowledgement. If the carrier assigned a claim ID, enter this number in the **Carrier Claim #** box that is located in the Carrier area. The carrier has 30 days to provide a claim ID and to acknowledge a claim.
3. Click the **Save** button.

#### *Return Authorization Cancelled*

4. If the return authorization has been cancelled, click the **Activities** tab and move to the **Cancelled/Code** box to enter the date on which the claim was cancelled.
5. Move to the box to the right of the **Cancelled/Code** box, and select the reason that best describes why the return authorization was cancelled.
6. Change the Status of the return authorization (upper right hand corner) to Closed.
7. Click the **Save** button.

#### *Return Authorization Rejected*

8. If the return authorization has been rejected, click the **Activities** tab and move to the **Rejected/Code** box to enter the date on which the return authorization was rejected. You can use the calendar button to open the calendar and select the appropriate date.
9. Move to the box to the right of the **Rejected/Code** box, and select the reason that best describes why the return authorization was rejected.
10. Change the Status of the return authorization (upper right hand corner) to Closed.
11. Click the **Save** button.

#### *Return Authorization Denied*

12. If the return authorization has been denied, click the **Activities** tab and move to the **Denied/Code** box to enter the date on which the return authorization was denied. You can use the calendar button to open the calendar and select the appropriate date.
13. Move to the box to the right of the **Denied/Code** box, and select the reason that best describes why the return authorization was denied.
14. Change the Status of the return authorization (upper right hand corner) to Closed.
15. Click the **Save** button.

#### *Diary*

Select the **Claim Diary** tab to add or modify the claim diary notes. See “*Diary Tab*” for information on adding claim diary notes to a claim.

*Entering a Claim Task*

1. Select the **Claim Tasks** tab to add information.
2. Click **Add Task**. The **New Claim Task** dialog box opens.

myEZClaim® Claim Task - Internet Explorer provided by Dell

http://test2008.myezclaim.com/MyEZClaimNet/Navigation/Claims/Pages/ClaimTask\_Popup.aspx?claimId=

**New Claim Task** **Save** **Delete** **Close**

**Notification Schedule:** [\(Refresh\)](#)

PENDING - Initial Email - New Task  
 1/6/2009 2nd Request Notification Email  
 1/13/2009 3rd Request Notification Email  
 1/20/2009 4th Request Notification Email  
 1/27/2009 Final Email - 'To Be Paid' Notification

priority: status: due date:  
 Normal Open 1/6/2009

days until notification: number of notifications:  
 7 (5) Initial, 2nd, 3rd, 4th, and final

description:

comments:

**Groups** **Administration Groups** **Charge To Contractor**

☐ Andy Demo  
☐ Atlanta Hub

Done Internet | Protected Mode: On 100%

3. From the **Priority** list, select the priority for the task.
4. The **Status** list will default to Open. The task is considered open until it completed. Once it is completed, the Status should be set to Closed.
5. Move to the **Due Date** box. If the date is not correct, you can enter a new date.  
OR click the **Calendar** button to select the date from the calendar. The Due Date indicates when the second request email will be sent.
6. Move to the **Days Until Notification** box. If the number is not correct, enter a new number. The Days Until Notification determines how many days between email notifications. If a "0" (zero) is entered, only the New Task email will be sent. No other notifications will be sent.
7. Move to the **Number of Notifications** box. Select how many notifications to send.
8. Move to the **Description** box. Enter a description for the task.
9. Move to the **Comments** box. Enter any comments for the task.
10. On the **Groups** tab, select the group(s) that will be responsible for completing the task.
11. On the **Administration Groups** tab, select the group(s) that will be notified when the task is closed.
12. If there is a charge to the contractor, click the **Charge to Contractor** tab and check the box **charge to contractor**. Enter all applicable information.
13. Click the **Save** button.

After you've made the required updates, click the **Save** button to close the Claim Properties window and save the updated information. If you need to cancel the changes you've made, simply click the **Cancel** button and the window is closed.



**NOTE:** Any changes made in Shipping Products, Documents, Activities, Diary, or Claim Tasks are NOT cancelled by clicking the Cancel button. You must manually undo any changes you've made in these sections.

## E-MAILING RETURN AUTHORIZATIONS AND DOCUMENTS

myEZClaim allows you to e-mail return authorizations once the required information is entered. You must enter at least one product and enter in the following documents before printing or emailing the Return Authorization Form: Loss or Damage Claim Form, Bill of Lading, and Purchase Order. If these have not been entered prior to clicking the Print button, an error message will indicate what information is missing.

1. Open the return authorization you want to e-mail. The Claim Properties window opens.
2. Click the **EMAIL** button. The **Email Message** dialog box opens.

myEZClaim® Email Properties - Internet Explorer provided by Dell

http://test2008.myezclaim.com/Navigation/Claims/Pages/Email\_Popup.aspx?claimId=7765&subject=Outstanding+Claim

**myEZClaim® Email Message** Send Close

Please enter valid email addresses, i.e. "name@company.com", separated with a comma or semicolon.

**Recipients** **Company** **Claimant** **Carrier** **Consignee** **Shipper**

**to...:**

**cc...:**

**bcc...:**

**from:** noreply@myezclaim.com

**subject:** Outstanding Claim #LD1000000119; Demotronics

! ↓ ✉ ↩ 0 Attachment [ 0.00 MB ]

☒ **Attach Claim**

☒ **Attach Claim Documents**

☐ **Attach Claim Diaries Report**

☐ **Zip Attachments**

☐ **Request Confirmation**


Done Internet | Protected Mode: On 100%


3. You can type the e-mail addresses in the To, CC:, and BCC boxes or click one of the buttons to select an email address from the list.
  - ▣ **Recipients** button. Click the **Recipients** button to select an address. The Recipients dialog box opens. This dialog box has a listing of all email addresses entered as Recipients. (See “Working with E-mail Recipients” for more information.)
  - ▣ **Company** button. Click the **Company** button to select an address. The Recipients dialog box opens. This dialog box has a listing of the **contact email** addresses entered for Companies.
  - ▣ **Claimant** button. Click the **Claimant** button to select an address. The Recipients dialog box opens. This dialog box has a listing of the **contact email** addresses entered for Claimants.
  - ▣ **Carrier** button. Click the **Carrier** button to select an address. The Recipients dialog box opens. This dialog box has a listing of the **contact email** addresses entered for Carriers.
  - ▣ **Consignee** button. Click the **Consignee** button to select an address. The Recipients dialog box opens. This dialog box has a listing of the **contact email** addresses entered for Consignees.
  - ▣ **Shipper** button. Click the **Shipper** button to select an address. The Recipients dialog box opens. This dialog box has a listing of the **contact email** addresses entered for Shippers.


Click the appropriate check boxes for the people you want to send the e-mail to. If you accidentally select the wrong e-mail address, just click the box to remove the check mark.


Click the Save button to return to the **Email Message** dialog box.

4. By default, the **From** field has an email address already in it. If the people receiving the email should not reply to the email address shown, enter a corrected email address.
5. Enter a subject in the **Subject** field. By default, a subject message is already generated with the claim number and the name of the company from the claim.

6. To send this e-mail with high importance, click the exclamation mark button. 

7. To send the e-mail with a low importance, click the down arrow button. 

8. To request a delivery receipt, click the mail button. 

9. Click the Flag button to flag the e-mail as a reply, forward, etc. 

The **Message Flags** dialog box opens. Select the appropriate flag and then click **Save** to return to the e-mail.



**NOTE:** If you are not certain as to what a button is for, just move the mouse pointer over the button. A ToolTip will be displayed with a description of the button.

10. By default, **Attach RA** is checked. If you do not want to e-mail the claim, click to the check box to remove the check mark.
11. By default, **Attach RA Documents** is checked. If you do not want to e-mail the claim, click to the check box to remove the check mark.
12. Click the box next to **Zip Attachments** to have the attachments e-mailed in a zipped format. Some companies have size limits for e-mails. Zipping the attachments may be the only way around this size limitation.
13. Click the box next to **Request Confirmation** if you want to have receipt of the claim acknowledged. By checking this box, the person(s) receiving this email will receive a link to confirm receipt of the claim online. This information will be recorded in the Diary section along with the name of the person who acknowledged receipt of the claim. This option is not shown if the claim has already been acknowledged.

14. To add additional documents, click the paper clip button. The **File Attachments** dialog box opens. Click the **Browse** button to locate the file. Once the file is located, select it and then click the **Open** button. Click the **Attach** button to attach the file and then click the **Save** button to return to the e-mail.
15. Enter a note for the e-mail in the big box below the attachments.
16. Click the **Send** button to send the e-mail. If this is the first time that the claim has been emailed, the **mailed date** on the **Activities** tab will show the date that the claim was emailed. The **Diary** tab on the claim is updated with information regarding the email.

## CLAIM CONFIRMATION

myEZClaim allows you to send claims to a carrier and allows the carrier to confirm receipt of the claim online. This information is then recorded into the claim's diary.

1. Open the claim you want to e-mail. The Claim Properties window opens.
2. Click the **EMAIL** button. The **Email Message** dialog box opens.

myEZClaim® Email Properties - Internet Explorer provided by Dell

http://test2008.myezclaim.com/Navigation/Claims/Pages/Email\_Popup.aspx?claimId=7765&subject=Outstanding+Clair

**myEZClaim® Email Message** Send Close

Please enter valid email addresses, i.e. "name@company.com", separated with a comma or semicolon.

**Recipients** **Company** **Claimant** **Carrier** **Consignee** **Shipper**

**to...:**

**cc...:**

**bcc...:**

from: noreply@myezclaim.com

subject: Outstanding Claim #LD1000000119; Demotronics

! ↓ ✉ 🖨

0 Attachment [ 0.00 MB ]

☒ **Attach Claim**

☒ **Attach Claim Documents**

☐ **Attach Claim Diaries Report**

☐ **Zip Attachments**

☐ **Request Confirmation**

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3. Click the box next to **Request Confirmation** to have receipt of the claim acknowledged. This option is not shown if the claim has already been acknowledged. By checking this box, the person(s) receiving this email will receive a link to confirm receipt of the claim online.
4. Complete the email as usual.

The person who you sent an email to will receive an email similar to the one shown below:



When they click the link, they are taken to a page to acknowledge the receipt of the claim:

myEZClaim® Acknowledge Claim

To complete the Claim Acknowledgement process, please enter you first and last name below then click the Submit button

first name:

last name:

comments:

your email address:

The carrier only needs to enter in their first name and last name and then click **Submit**. A thank you dialog will be shown when they have completed the confirmation. If the claim has already been confirmed, a message will be shown stating who confirmed the claim.

Once the claim has been confirmed, the Diary tab on the claim will be updated with who acknowledged the receipt of the claim, any comments entered, and the date it was acknowledged. The Acknowledgement Date will also be filled in on the Activities tab.

SHIPPING PRODUCTS				CREDIT/DEBIT				DOCUMENTS				ACTIVITIES				DIARY				PAYMENTS				CLAIM TASKS				SUBROGATION			
date of		updated by																													
7/17/2007		myEZClaim® Administrator																													
7/17/2007		myEZClaim® Administrator																													



## CONVERTING A RETURN AUTHORIZATION

myEZClaim allows you to convert a return authorization into a Loss and Damage claim. Converting a return authorization creates an identical loss and damage claim. The original return authorization will include a diary entry that lists the claim number of the loss and damage claim. The loss and damage claim that is created by converting the return authorization includes a diary entry that lists the return authorization claim number.

1. Open the return authorization that needs to be converted.
2. Click the **Convert** button. The dialog opens.

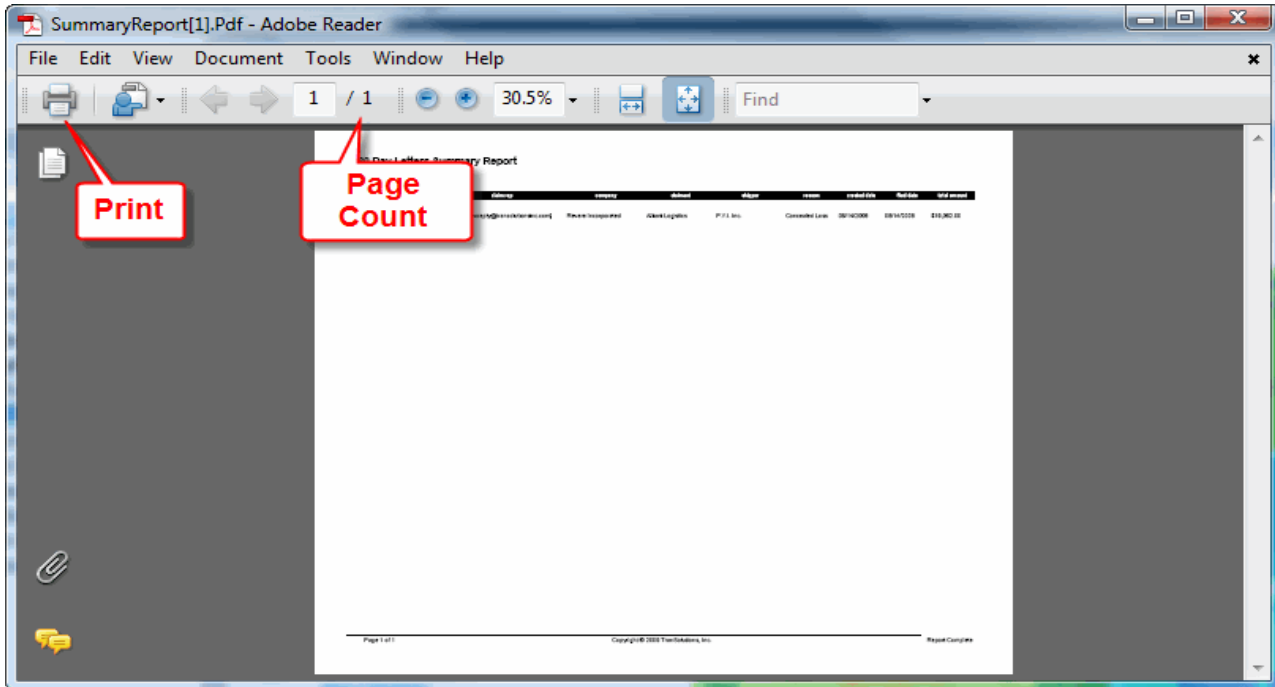
The screenshot shows a web browser window titled "myEZClaim® Convert Claim - Internet Explorer provided...". The address bar shows the URL "http://86.124.36.102/myezclaimNet\_2008/Navigation/Claims/Pages/Co...". The main content area is a dialog box titled "Convert to Loss And Damage Claim" with "Apply" and "Close" buttons. The dialog contains two sections: "select the claim number:" and "select the claim status:". In the first section, "system generated" is selected with a radio button, and "claim prefix" is set to "LD". In the second section, "status:" is set to "Outstanding" in a dropdown menu. The browser's status bar at the bottom shows "Internet | Protected Mode: On" and a zoom level of "100%".

3. Accept the **System Generated** claim number *or* select **User Assigned** and enter your claim number.
4. Select the status for the converted claim. The only status that cannot be selected is Closed.
5. Click the **Apply** button. The claim window opens.
6. Make any changes and save the claim.

## PRINTING THE RETURN AUTHORIZATION FORM

myEZClaim allows you to e-mail return authorizations once the required information is entered. You must enter at least one product and enter in the following documents before printing or emailing the Return Authorization Form: Loss or Damage Claim Form, Bill of Lading, and Purchase Order. If these have not been entered prior to clicking the Print button, an error message will indicate what information is missing.

1. From the Claims page, open the return authorization you want to e-mail. The Claim Properties window opens.
2. Click the **Print** button. The form opens in PDF format.



3. You can view the form, save it, or print it.
  - ▣ To save the form, click the save button, enter a name for the file and then click **Save**.
  - ▣ To print the form, click the print button, and click **OK**.

# WORKING WITH REPORTS

# 4

MyEZClaim provides a number of management reports that assist you with tracking your claims and determining the efficiency of your carriers. MyEZClaim includes reports based on claim status, reason for closure, and amount recovered. In addition, there are accounting reports, including an accounts receivable report, cash receipt and write-off report. MyEZClaim also includes listings of the businesses, lookup values and products that you've entered.

These reports can be run by first clicking the **Reports** group tab, then clicking the desired shortcut (**Outstanding Reports**, **Detail Reports**, **Graphs Reports**, **Addresses Reports** or **Lookup Reports**), and finally selecting the appropriate report. The reports have several different delivery formats: Adobe Acrobat PDF (\*.pdf), Microsoft® Excel (\*.xls), Internet HTML (\*.htm), and Rich Text Format (\*.rtf). Adobe Acrobat PDF (\*.pdf) is the default.

The following is a list of the reports provided with MyEZClaim and a brief description of each report.

## OUTSTANDING REPORTS

The Outstanding Reports are secured by access levels. There are two access levels for the Outstanding Reports, Report Standard and Report Management. If the report has an access level of Report Standard, you must have the *Report Standard* role assigned to you. If the report has an access level of Report Management, you must have the *Report Management* role assigned to you.

### Outstanding Claims by Carrier

This report provides a listing of all outstanding claims, sorted by Company and then by Carrier. The report includes the Company, Claim Number, Carrier, Reason, Freight Bill, Outstanding, Bill of Lading, Date Filed, Date Created, Days Old, Date Mailed, Last Updated, Days since Last Update, totals by carrier for the company, and totals for the company. The report provides record selection options for the Company Name, Carrier Name, Created or Filed Date, and Claim Type.

### Outstanding Claims by Date

This report provides a listing of all outstanding claims, sorted by Company and then by Created Date in descending order. The report includes the Company, Claim Number, Carrier, Claimant, Reason, Bill of Lading, Carrier Claim Number, Outstanding amount, Date Created, Days Old, Last Update, and Days since Last Update. The report provides record selection options for the Company Name, Carrier Name, Created or Filed Date, and Claim Type.

### Outstanding Claims by Carrier for All Companies

This report provides a listing of all outstanding claims, sorted by Company and Carrier for all Companies. The report includes the Company, Claim Number, Carrier, Reason, Freight Bill, Outstanding, Bill of Lading, Date Filed, Date Created, Days Old, Date Mailed, Last Updated, Days since Last Update, totals by carrier for the company, and totals for the company. The report provides record selection options for the Carrier Name, Created or Filed Date, and Claim Type.

### Outstanding Claims by Amount

This report provides a listing of all outstanding claims, sorted by Company and then by Outstanding amount. The report includes the Company, Claim Number, Carrier, Reason, Bill of Lading, Outstanding, Date Created, Days Old, Last Update, Days since Last Update, totals for each Company, and Grand Total. The report provides record selection options for the Company Name, Carrier Name, Created or Filed Date, and Claim Type.

### Export Format - Detail Report of Outstanding Claims by Amount

This report provides a listing of all outstanding claims, sorted by Company Code and then by Outstanding amount. The report includes the Company Code, Company Name, Claim Number, Carrier, Freight Bill Pro#, Carrier Claim Number, Shipper, Consignee, Claim Reason, Outstanding Amount, Date Filed, Days Old, Last Diary Comment, and up to three

additional document type numbers. The report provides record selection options for the Company Name, Carrier Name, Created Date, and Claim Type, and up to three additional document types.

## RUNNING OUTSTANDING REPORTS

1. Click the **Reports** group tab. The Outstanding Reports page opens.
2. Click the report you want to run. The **Report Criteria** dialog box opens.

The screenshot shows a web browser window titled "Outstanding Claims by Amount - Internet Explorer provided by Dell". The address bar shows the URL: <http://test2008.myezclaim.com/Navigation/Reports/Pages/RunReport.aspx?mode=Outstanding Claims by Amount>. The page has a title bar "Outstanding Claims by Amount" and buttons "Send By Email", "Run", and "Close". The form contains the following fields:

- Company From:** (text input)
- Company To:** (text input)
- Carrier From:** (text input)
- Carrier To:** (text input)
- Filed Date:** (dropdown menu)
- From:** 8/1/2009 (calendar icon)
- To:** 8/28/2009 (calendar icon)
- Claim Types: (multiple):** (list box containing "Freight Bill Overcharge", "Loss and Damage", "Return Authorization")
- Delivery format:** Adobe Acrobat PDF (\*.pdf) (dropdown menu)

The status bar at the bottom shows "Done", "Internet | Protected Mode: On", and "100%".

3. Click **Company From**. The **Find Company** dialog box opens.

The screenshot shows a web browser window titled "MyEZClaim® Find Company - Internet Explorer provided by Dell". The address bar shows the URL: [http://test2008.myezclaim.com/Navigation/My%20Account/Pages/Find\\_Popup.aspx?ShowAd](http://test2008.myezclaim.com/Navigation/My%20Account/Pages/Find_Popup.aspx?ShowAd). The page has a title bar "Find Company" and buttons "Find", "Add", and "Close". The form contains the following fields:

- Field to search:** Full Name (dropdown menu)
- Find criteria:** (text input)
- Max records:** 30 (text input)
- Find region:** NORTH AMERICA (dropdown menu)
- Use My Company:** ☒ (Checked = True : Unchecked = False)

Below the form, the following information is displayed:

Company: MG Corporation [MG1234]  
 Contact: Mike Gard  
 Address: 123 Main St  
 Willoughby Hills, OH 44120  
 UNITED STATES

An "Apply" button is located at the bottom right of the form area. The status bar at the bottom shows "Done", "Internet | Protected Mode: On", and "100%".

4. If the Region is incorrect, select a different region from the list. By default, the region you are working in is in the **Find Region** box.
5. Select the company from the list and click the **Apply** button to return to the report criteria.
6. Click **Company To**. The **Find Company dialog** box opens.
7. Select the company from the list and click the **Apply** button to return to the report criteria.



**NOTE:** Instead of selecting companies from the dialog boxes, you can enter complete names, partial names, or just letters, such as A to M. You can even leave the boxes blank to print all companies

8. In the **Carrier From** and **Carrier To** boxes, enter a range of carrier names. You can enter complete names, partial names, or just letters, such as A to M. You can leave these boxes blank to print all carriers.
9. By default, the date type defaults to Filed Date.
10. Enter a range of dates in the **Date From** and **Date To** boxes. These ranges are inclusive, dates that are either equivalent to, or between the **Date From** and **Date To** values, are included in the report. The default is a one month range. You can clear these boxes to run a report for all dates.
11. Select the **Claim Types**. Leave blank to select all claim types.
12. Select the **Delivery Format** from the list.
13. Click the **Run** button. The reports open in the selected delivery format. You can review the reports and print them.



**NOTE:** Instead of clicking the **Run** button, you can click the **Send By Email** button to send the report via email.

## DETAILED REPORTS

The Detailed Reports are secured by access levels. There are three levels for the Detail Reports:

### ■ None

If the report shows *None* for the access level, all users will have access to this report.

### ■ Report Letters

If the report has an access level of Report Letters, you must have the *Report Letters* role assigned to you.

### ■ Report Management.

If the report has an access level of Report Management, you must have the *Report Management* role assigned to you.

## DETAILED REPORTS — DAY LETTERS

These letters and forms are open to all users.

### 120-Day Letter

This report prints a 120-day follow-up letter for a claim.

### 30-Day Letter

This report prints a 30-day follow-up letter for a claim.

### 60-Day Letter

This report prints a 60-day follow-up letter for a claim.

**90-Day Letter**

This report prints a 90-day follow-up letter for a claim.

**RUNNING DETAILED REPORTS — LETTERS**

The steps for running letter reports is almost identical.

1. Click the **Reports** group tab.
2. Click the **Detail Reports** button. The Detail Reports page opens.
3. Click the letter or form report you want to run. The **Report Criteria** dialog box opens.

4. In the **Claim Number** box, enter the claim number.
5. Click the **Run** button. The letter opens in .pdf format. You can review the reports and print them.



**NOTE:** Instead of clicking the **Run** button, you can click the **Send By Email** button to send the report via email.

**DETAILED REPORTS — REPORT LETTERS**

These letters and forms are secured. You must have the *Report Letters* role assigned to you.

**Acknowledgment Letter — ETS**

This report prints a letter for acknowledging a claim. The letter lists the amount of the claim and requests additional documentation.

**Acknowledgment Letter — XGL**

This report prints a letter for acknowledging a claim.

**Cargo Claims Check Request**

This report prints a cargo claims check request form. Included in this letter is the amount of the claim, claim number, vendor account number, consignee name and address, and HAWB/HBOL #. The form includes spaces to be filled out for Liability Configuration, Comments, Requested By and Approved By.

**Check Request**

This report prints a check request. Included in this letter are the Claimant's name and address, the claimant's contact name, claim number, Acct Rec #, claimant's reference number, and the amount of the claim.

**Claim Notification Letter**

This report prints a notification letter for a claim. It includes the following information from the claim: Trailer Number, Shipment Date, Shipper Name, Consignee Name, Company Name, Claim #, Invoice Number. The letter requests copies of the Bill of Lading, Loading/Unloading Sheets, Inspection Reports, Ingate/Outgate J-1, and Proof of Delivery.

**Form — Bill of Lading**

This report prints a Bill of Lading form based on the claim.

**Form — Carrier Return Authorization**

This report prints a return authorization based on the Return Authorization claim type.

**Form — Claim Salvage Report**

This report prints a salvage report based on the claim. It includes the carrier's information, claim number, Pro number, company information, Bill of Lading #, Acct Rec #, and the product information from the claim.

**Form — Damage Summary**

This report prints a damage summary letter. The letter includes the following information from the claim: Consignee name, consignee phone #, consignee contact name, product information, Bill of Lading #, PO#, and Acct Rec #. The letter also allows for you to include comments when the report is run.

**Form — Dealer Return Authorization**

This report prints a return authorization letter based on the claim. The letter includes the following information from the claim: consignee name, consignee address, consignee contact name, consignee phone number, consignee fax #, Acct Rec #, claim number, and product information. The form requires that you specify the shipper and the company to schedule pick up with when running this report for the claim.

**Form — Destroy Authorization**

This report prints a destroy authorization letter based on the claim. The letter includes the following information from the claim: consignee name, consignee address, consignee contact name, consignee phone number, consignee fax #, Acct Rec #, claim number, BOL#, PO#, and product information.

**Form — Inspection Request**

This report prints a letter for acknowledging a claim. The letter includes the following information from the claim: carrier name, carrier phone number, carrier fax number, consignee name, consignee address, consignee contact name, consignee phone number, Acct Rec #, claim number, BOL#, PRO#, and product information.

**Form — Plant Notification**

This report prints a plant notification form. The form includes the following information from the claim: consignee account number, consignee name, consignee address, claim number, carrier name, BOL#, and product information. The form allows you to enter who to send the form to the attention of and allows you to enter additional comments.

**Letter of Intent**

This report prints a letter of intent against a carrier for a claim. The letter includes the following information from the claim: carrier name, carrier address, claim number, shipper name and address, Acct Rec #, consignee name, and consignee address.

**DETAIL REPORTS — REPORT MANAGEMENT**

The reports described below are restricted to those who have report management access.

**Accounts Receivable**

This report provides a summary of all claims, sorted by Company and Carrier. The report includes the totals for Claims Filed, Outstanding Amounts, Recovered claims and a total for the Cancelled, Denied & Rejected Claims. Each of these groups includes the number of claims filed and the total of these claims, for both the Current Period and Year-To-Date (YTD). The report also provides a range option for the Created Date and Year-To-Date, allowing you to select a specific date range to review. The date ranges are used to calculate the Current Period totals and Year-To-Date totals.

**Accounts Receivable By Status Type**

This report provides a summary of all claims, sorted by Company and Carrier. The report includes the totals for Claims Filed, Outstanding Amounts, Recovered claims and a total for the Cancelled, Denied & Rejected Claims. Each of these groups includes the number of claims filed and the total of these claims, for both the Current Period and Year-To-Date (YTD). The report also provides a range option for the Created Date and Year-To-Date, allowing you to select a specific date range to review. The date ranges are used to calculate the Current Period totals and Year-To-Date totals.

**Carrier Exception**

This report prints an A&R Transport Exception report for a single claim. Included in this report is the Consignee Name, Date shipped, Date Received, Trailer #, Pro #, Vendor Name, amount received amount over, amount short, damages amount, seal number, seal intact, and the claim number.

**Cash Receipt Report**

This report provides a summary of all claims on which payments have been received, sorted by Company, Carrier and then Payment Date. The report includes the Company, Claim Number, Carrier, Claim Amount, Payment Amount, Write-Off, Type, Payment, Check Number, Check Date and Payment Date. The report provides record selection options for Company, Carrier, Payment Date, Status Code, Status Type, and Claim Type.

**Claim And Subrogation Payments**

This report provides a summary of all claims on which claim and subrogation payments have been received, sorted by Company, Shipper, Carrier, and then Payment Date. The report includes the Company, Claim Number, Carrier, Shipper, Date Filed, Claim Amount, Payment Amount, Payment Date, Subro Amount, Subro Date, Difference, and Status. The report provides record selection options for Company, Carrier, Payment Date, Status Code, Status Type, and Claim Type.

**Claim Stratification Report**

This report provides a summary of the amount of all claims for the specified period. The report includes the strata, claim count, value of the claims, outstanding amount and grand totals. The report provides record selection options for Date Ranges, Company, Status Code, Status Type, and Claim Type.

**Claim Subrogation Payment Details**

This report provides a listing of all claims on which subrogation payments have been received, sorted by Claimant, Carrier, and then Payment Date. The report includes the Claim Number, Claimant, Carrier, Date Filed, Claim Amount, Subrogation Amount, Difference, Type, Subro Date, Reason, and Status. The report provides record selection options for Period Range, Date Search (Payment Date or Date Filed), Company, Subrogation Status, and Claim Type.



### Claim Subrogation Payment Summary

This report provides a summary of all claims on which subrogation payments have been received, sorted by Subrogation Reason and then Subrogation Type. The report includes the Subrogation Reason, Subrogation Type, Claim Filed Amount, Number of Payments, Value by Reason and grand totals for each. The report provides record selection options for Period Range, Date Search (Payment Date or Date Filed), Company, Subrogation Status, and Claim Type.

### Claim Task Levels Details

This report provides details of all tasks, sorted by Alert Type and then Claim Number. The report includes the Alert Type, Claim Number, Carrier, Claimant, AR Number, Claim Amount, Claim Reason, Due Date, and number of Days Overdue for each task. The report provides record selection options for Period Range, Company, and Claim Type.

### Claim Task Levels Summary

This report provides a summary of all tasks, sorted by Carrier. The report includes the Carrier, totals for the initial through the final task for the current period and the year to date. The report includes grand totals for each. The report provides record selection options for Period Range, Year-to-Date Range, Company, Region, and Claim Types (multiple).

### Claim Top 15 Summary

This report provides a summary of the top 15 Agents, Claimants, Carriers, Consignees, Reasons, or Shippers filed for the reporting period specified. This report includes the name, number of claims, and value with grand totals. The report provides record selection options for a Date Filed range, Report Type (Agents, Claimants, Carriers, Consignees, Reasons, or Shippers), Company (multiple), Status Type, and Claim Types (multiple).

### Claims Filed by Carrier

This report provides a summary of reports filed by carriers for the date range specified. This report includes the Carrier, if the claim was a loss or damage claim, Number of Claims Filed, Invoice Cost, Carrier Liability, and Actual Loss. The report provides record selection options for a Created Date range, Company (multiple), Region (multiple), and Claim Types (multiple).

### Claims Filed by Month

This report provides a summary of loss and damage reports filed for the month, quarter, and year for the reporting period specified. This report includes the claim type, number of incidents, invoice costs, carrier liability, and actual loss. The totals are broken down for the month, the quarter and the year. The report provides record selection options for a Reporting Period, Company (multiple), Business Group (multiple), and Claim Types (multiple).

### Claims Summary by Account

This report provides a summary of loss and damage reports filed for the current period and year for the reporting period specified. This report breaks out the claims filed to the claims that are recovered, denied, rejected, cancelled, subrogation, and outstanding. The report breaks out these claims further by short and damaged. The report includes counts, amounts, outstanding claims by company name and includes an aging of those claims. The report provides record selection options for a Current Period range, Year-to-Date range, option to include the outstanding claims, Region (multiple), and Claim Types (multiple).

### Claims Summary by All/Region/Company

This report provides a summary of loss and damage reports filed for the current period and year for the reporting period specified. This report breaks out the claims filed to the claims that are recovered, denied, rejected, cancelled, subrogation, and outstanding. The report breaks out these claims further by short and damaged. The report includes counts, amounts, outstanding claims by company name and includes an aging of those claims. The report provides record selection options for a Current Period range, Year-to-Date range, option to include the outstanding claims, Company (multiple), Region (multiple), and Claim Types (multiple).

**Detail Report of Cancelled Claims**

This report provides a listing of cancelled claims for the companies, carriers, and period specified. This report breaks out the cancelled claims by company and then cancelled reason. The report includes company, cancelled reason, claim number, carrier, product, serial number, claim reason, bill of lading, invoice number, order number, claim amount, and cancelled date. The report provides record selection options for a Company Range, Carrier Range, Cancelled Date range, and Claim Types (multiple).

**Detail Report of Claim Rep Productivity**

This report provides a listing of reports filed for each company by claim rep for the current period specified. This report breaks out the claims by company and then claim rep. The report includes company, claim rep, number of filed claims, total claim value filed, average time claim open, number of closed claims, claim value closed, claim recovered, and claim value recovered. The report provides record selection options for Company range, Carrier range, Current Period range, Status Code, Status Types, and Claim Types (multiple).

**Detail Report of Claims Acknowledgement**

This report provides a listing of claims sorted by company, claimant, and claim number for the period specified. The report includes company, claimant, claim number, freight bill pro number, email address, claim reference number, date of delivery, date created, date requested, claim rep, claim status, claim amount, shipper, and consignee. The report provides record selection options for Company range, Carrier range, Created Date range, Status Code, Status Type, and Claim Types (multiple).

**Detail Report of Claims By Closed Date**

This report provides a listing of closed claims for the companies, carriers, and closed date period specified. This report breaks out the closed claims by BOL number and company. The report includes BOL number, company, claim number, carrier, created date, filed date, closed date, claim amount, total payments, write-off amount, payments 1-3, checks 1-3, type, date, and reason. The report provides record selection options for a Company Range, Carrier Range, Closed Date range, and Claim Types (multiple).

**Detail Report of Claims By Consignee Location**

This report provides a summary report of claims for the specified criteria. This report breaks out the claims by location and then Consignees with outstanding claims. The report provides totals for each location that includes totals for claims filed, recovered, denied, rejected, canceled and outstanding. The location summary includes a claim count for each claim status and total dollar amount with Year-to- date totals. The outstanding reports are summarized by consignee for each location. The outstanding summary breaks out the outstanding claims counts and amounts by 0 to 30 days, 31 to 60 days, 61 to 90 days, and 91 days and greater. The report provides record selection options for a Company Range, Consignee Range, Current Period Range, and Year - to - Date.

**Detail Report of Claims By Diary Notes Category**

This report provides a listing of claims for the specified criteria. This report breaks out the claims by claim status, diary note type, company name, and then claim number. The report includes claim status, diary note type, claim number, company, diary date, diary notes, vendor number, vendor name, vendor address, vendor phone, amount, claim rep, carrier, claimant, filed date, and recovered amount. The report provides record selection options for a Company Range, Carrier Range, Claimant Range, Filed Date range, Diary Date range, Diary Note Category, Status Code, Status Type, and Claim Types (multiple).

**Detail Report of Claims by Inbound and Outbound**

This report provides a listing of claims, sorted by Company, Consignee, Acknowledgement or Paid Date first for claims which do not specify whether the shipment was Inbound or Outbound, Acknowledgement or Paid Date for Inbound Claims and Outbound claims, and finally by Claim ID. The report includes the Company, Consignee, Claim Number, Status, Date, Created Carrier, Claim ID, Reason Paid/Ack Date, Adjustment, and Claim Amount. The report provides record selection options for the Company, Carrier, Created Date, Status Code, and Claim Types (multiple).

**Detail Report of Claims by Inbound and Shipper**

This report provides a listing of inbound claims, sorted by Company, Shipper, and Date Created. The report includes the Company, Shipper, Claim Number, Carrier, Reason, Status, Claim Amount, and Date Created. The report provides record selection options for Company, Carrier, Created Date, Status Code, and Claim Types (multiple).

**Detail Report of Claims by Reason**

This report provides a listing of claims, sorted by Company, Reason, Claim Status, and Claim ID. The report includes the Company, Claim Reason, Claim ID, Carrier, Claim Status, Claim Amount, Amount Paid, and Created Date. The report provides record selection options for Company, Carrier, Created Date, Status Code, and Claim Types (multiple).

**Detail Report of Claims by Status**

This report provides a listing of all claims, sorted by Company, Claim Status and Created Date. The report includes the Company, Claim Status, Claim ID, Claim Carrier, Claim Reason, Claim Amount, Created Date and Days Old (based on the Closed Date). The report provides record selection options for Company, Carrier, Created Date, Status Code, and Claim Types (multiple).

**Detail Report of Claims By Status And Claimant**

This report provides a listing of claims, sorted by Company, Status Type, Claimant, and then Claim Number. The report includes the Company, Status Type, Claimant, Claim Number, AR Number, Document Origin, Carrier, Claim Reason, Claim Amount, Payments, Outstanding Amount, Filed Date and Days Old. The report also includes totals by company for each status type and totals for the company. Grand totals are also included. The report provides record selection options for the Company, Carrier, Created Date, Status Code, and Claim Types (multiple).

**Detail Report of Claims By Status And Diary**

This report provides a listing of claims, sorted by Company, Status Type, Consignee, and then Claim Number. The report includes the Company, Status Type, Consignee, Claim Number, AR Number, Carrier, Delivery Carrier, Claim Reason, Claim Amount, Payments, Outstanding Amount, Subro Amount, Filed Date, Diary Date, and Last Diary Note. The report also includes totals by company for each status type and totals for the company. Grand totals are also included. The report provides record selection options for the Company, Carrier, Created Date, Status Code, and Claim Types (multiple).

**Detail Report of Claims By Status And Diary (document origin)**

This report provides a listing of claims, sorted by Company, Status Type, Claimant, Consignee, and then Claim Number. The report includes the Company, Status Type, Claimant, Consignee, Claim Number, AR Number, Carrier, Document Origin, Claim Reason, Claim Amount, Payments, Outstanding Amount, Subro Amount, Filed Date, Diary Date, and Last Diary Note. The report also includes totals by company for each status type and totals for the company. Grand totals are also included. The report provides record selection options for the Company range, Carrier range, Created Date, Status Code, and Claim Types (multiple).

**Detail Report of Claims Filed And Recovered**

This report provides a listing of claims, sorted by Company and then Claim Number. The report includes the Company, Claim Number, Carrier, Claim Reason, Claim Amount, BOL Date, Filed Date, Recovered Amount, Date Recovered, Write-off Amount, Date of Write-off, Balance, Status, Recovered Percentage, and Diary Notes. The report also includes totals for each company and grand totals. The report provides record selection options for the Company, Carrier, Created Date, Status Code, and Claim Types (multiple).

**Detail Report of Claims For Installers Edge**

This report provides a listing of claims, sorted by Company and then Claim Number. The report includes the Company, Claim Number, Claimant Reference Number, Pro/Freight Bill Number, Claim Amount, and date of Diary Last Update. The report provides record selection options for the Company range, Claimant range, Created Date, Status Code, and Claim Types (multiple).

**Detail Report of Claims Metrics**

This report provides a listing by Company of claims open at the beginning of the month, closed during the month, opened during the month, claim outstanding during the month, average days to close a claim. The reporting period is for one year. The report is further broken out by each month up until the selected reporting period month. The report provides record selection options for the Company range, Claimant range, Reporting Period, and Claim Types (multiple).

**Detail Report of Claims Settlement By Carrier**

This report provides a listing of claims by Company, Carrier, and Claim Number. The report includes the Company, Carrier, Claim Number, Consignee Claim Number, Status, Filed Date, Date Closed, # of Days, Claim Amount, Payment Amount, Write-Off Amount, Outstanding Amount, % Paid, and includes any cancelled, rejected or denied information for the claim. The report has totals for each carrier and company. The report also includes grand totals. The report provides record selection options for the Company range, Carrier range, Filed Date range, Status Code, Status Type, and Claim Types (multiple).

**Detail Report of Claims Summary Report**

This report provides a list claim counts and claim amount for the current period and year to date specified. The information is broken down for each Company. The claims are broken out by claims filed, claims recovered, denied, rejected, cancelled, subrogation, and outstanding. The report provides record selection options for the Company range, Carrier range, Current Period range, Year to Date range.

**Detail Report of Daily Transaction Logs**

This report provides a list of daily transactions for the period specified. The report is broken out into daily totals for the company and then daily totals for each user. The report includes number of logins, new claims, updated claims, letters, diary/notes, payments, status changes, and total transactions. The report provides record selection options for the Report Period range.

**Detail Report of Denied Claims**

This report provides a listing of all denied claims, sorted by Company, Denial Reason, and Claim Number. The report includes the Company, Denial Reason, Claim Number, Claimant, Carrier, Claim Reason, Claim Amount, Filed Date and Denied Date. The report also includes total for the denied reason and then totals for each company and then includes grand totals. The report provides record selection options for Company range, Carrier range, Denied Date range, and Claim Types (multiple).

**Detail Report of L/D Claims By Carrier/Reason**

This report provides a listing of claims sorted by company, carrier, reason, and then claim number. The report includes the Company, Carrier, Reason, Claim Number, Status, Filed Date, Created Date, SKU, Description, Quantity, and Claim Amount. The report also includes the total claim amount for each reason, for the carrier and for the company. The report list grand totals. The report provides record selection options for the Company range, Carrier range, Filed Date range, Status Code, and Status Type.

**Detail Report of L/D Claims By Consignee**

This report provides a listing of all Loss and Damage claims, sorted by Company, Consignee, and Claim Number. The report includes the Company, Consignee, Claim Number, Shipper, Status, Created Date, Filed Date, Carrier Claim ID, Product ID, Quantity, Cost/Unit, Line Total, Adjustments (+/-), and Claim Amount. The report includes totals for each Consignee per company and totals for the company. Grand totals are listed at the end of the report. The report provides record selection options for Company range, Consignee range, Created Date range, Status Code, and Status Type.

**Detail Report of L/D Claims By Product**

This report provides a listing of all products involved in Loss and Damage claims, sorted by Company and Claim Number. Both open and closed claims are included in the report. The report includes Company, Claim Number, Order Number, Carrier, Product ID, Product Description, Quantity, Reason, Claim Amount, Filed Date, and Status. The

report provides record selection options for Company range, Carrier range, Filed Date range, Status Code, and Status Type.

### **Detail Report of L/D Claims By Shipper/Reason**

This report provides a listing of claims sorted by Company, Shipper, Reason, and Claim Number. The report includes the Company, Shipper, Reason, Claim Number, Consignee, Status, Created Date, Filed Date, Carrier Claim ID, SKU, Description, Quantity, and Claim Amount. The report includes totals of reason by shipper, totals for shippers, and grand totals. The report provides record selection options for Company range, Shipper range, Created Date range, Status Code, and Status Type.

### **Detail Report of L/D Claims By SKU/Reason**

This report provides a listing of claims sorted by Company, SKU, Reason, and Claim Number. The report includes the Company, SKU, Reason, Claim Number, Status, Filed Date, Created Date, Claimant, Description, Quantity, and Claim Amount. The report includes totals of reason by SKU, totals for SKU, totals for Company, and grand totals. The report provides record selection options for Company range, Claimant range, SKU/Product range, Filed Date range, Status Code, and Status Type.

### **Detail Report of Pending Cancelled Claims**

This report provides a summary of cancelled pending claims by Company and then Cancel Reason. The report lists totals for claims that have been cancelled by the Company name and the cancel reason. The report includes the claim numbers, claim rep, carrier name, product, serial number, claim reason, bill of lading number, invoice number order number claim amount, and cancelled date. The report also includes the totals by company for each cancel reason and for each company. The report provides record selection options for Company range, Carrier range, Cancelled date range, Status Code, Status Type, and Claim Types (multiple).

### **Detail Report of Pending Claim Summary Report**

This report provides a summary of pending claims by Company. The report lists totals for Pending Claims Filed, Pending Claims Converted, Pending Claims Canceled, and Averages for the specified Current Period and the Year to Date ranges. The report also includes the total claims amount. The report provides record selection options for Company range, Current Period range, Year to Date range, and Claim Types (multiple).

### **Detail Report of Pending Claims by Carrier**

This report provides a list of pending claims by Company and then Carrier. The report includes Company, Carrier, Claim Number, Bill of Lading, Freight Bill (Pro #), Shipping, Consignee, Invoice Amount, Outstanding amount, date created, status, date closed, and days old. The report also includes totals for Invoice amount and outstanding amount for each carrier as well as totals for the company. The report provides record selection options for Company range, Carrier range, Cancelled date range, Status Code, Status Type, and Claim Types (multiple).

### **Detail Report of Pending Claims by User Status**

This report provides a list of pending claims by Company and then claim number. The report includes Company, Claim Number, Carrier, Bill of Lading, User Entry, Status, Claim Rep, Date Created, Date Requested, Claim amount, days old, outstanding, and date closed. The report also includes totals for claim count, claim amount and outstanding amount for each company. The report provides record selection options for Company range, Created date range, Status Code, Status Type, and Claim Types (multiple).

### **Detail Report of Pending Claims by User Status**

This report provides a list of pending claims by Company and then claim number. The report includes Company, Claim Number, Carrier, Bill of Lading, User Entry, Status, Claim Rep, Date Created, Date Requested, Claim amount, days

old, outstanding, and date closed. The report also includes totals for claim count, claim amount and outstanding amount for each company. The report provides record selection options for Company range, Created date range, Status Code, Status Type, and Claim Types (multiple).

### **Detail Report of Pending Claims Summary**

This report provides a summary of pending claims by Company. The report includes the Company name, with totals for the current period and year to date periods specified. The Current Period and Year To Date sections have totals for claim count # of days, Average of days, and Amount for Filed POD, Converted POD, Cancelled POD. Averages for each are also shown. The report also includes Average Cycle Time for each company. The report provides record selection options for Company range, Carrier range, Current Period range, Year-to- date range, and Claim Types (multiple).

### **Detail Report of Pending Converted Claims with Cycle Time**

This report provides a summary of pending converted claims by Company. The report includes the Company name, claim number, claim rep, claim amount, age, status, carrier, consignee, reason, shipper, bol date, date requested, and cycle time. The report also includes Average Cycle Time for each company. The report provides record selection options for Company range, Created Date range, Status Code, Status Type, and Claim Types (multiple).

### **Detail Report of Rejected Claims**

This report provides a listing of all rejected claims, sorted by Company, Rejection Reason, and Claim Number. The report includes the Company, Rejection Reason, Claim Number, Carrier, Claim Reason, Bill of Lading, Claim Amount, Created Date and Rejected Date. The report provides record selection options for Company range, Carrier range, Rejected Date range, and Claim Types (multiple).

### **Export Format - Claim Subrogation Payment Details1**

This report provides a listing of all claims on which subrogation payments have been received, sorted by Claimant, Carrier, and then Payment Date. The report includes the Claim Number, Claimant, Carrier, Date Filed, Claim Amount, Subrogation Amount, Difference, Type, Subro Date, Reason, and Status. The report provides record selection options for Period Range, Date Search (Payment Date or Date Filed), Company (multiple), Subrogation Status, and Claim Type (multiple).

### **Export Format - Claims Per Invoice Report**

This report provides a listing of all claims with the specified claim number, sorted by Claim Date. The report includes the Claim Number, Customer, BOL Date, Invoice Number, Total Amount, Carrier, BOL Number, Claim Date, Claim Reason, Ship Point, Claimant, Shipper, and Company. The report provides record selection options for Invoice Number.

### **Export Format - Detail Report of Claims**

This report provides a listing of claims for the specified criteria. This report breaks out the claims by company and then date filed. The report includes Company, Claim Rep, Shipped From (claim), Ship From (Shipper), Ship From Address, Ship To (consignee), Ship To Address, Ship Date, Delivery Date, BOL or Pro Number, Carrier Claim Number, Client Reference Number, Claim Number, Status, Carrier, Delivery Carrier, Vehicle Number, Date Filed, Age, Trans Mode, in/outbound, Reason, Date Closed, Canceled/Rejected/Denied, Requester Name, Document Origin, Cost Center, Invoice Amount, RA Number, Bus Group, Product Line, Product ID, Product Description, Serial Number, Invoice Number, Order Number, Quantity, Line Total, Invoice Total, Discount Amount, Freight Amount, Other Amount, Claim Amount, Payment Amount, Write-off, Outstanding Amount, PO Number, Buyer Code, Vendor Code, Authorization Number, E-mail Sent to. The report provides record selection options for a Company Range, Consignee Range, Filed Date range, Status Code, Status Type, and Claim Types (multiple).

### **Export Format - Detail Report of Claims - Extended**

This report provides a listing of claims for the specified criteria. This report breaks out the claims by company and then date filed. The report includes Company, Claim Rep, Shipped From (claim), Ship From (Shipper), Ship From Address,



Ship To (consignee), Ship To Address, Ship Date, Delivery Date, BOL or Pro Number, Carrier Claim Number, Client Reference Number, Claim Number, Status, Carrier, Delivery Carrier, Vehicle Number, Date Filed, Age, Trans Mode, in/outbound, Reason, Date Closed, Canceled/Rejected/Denied, Requester Name, Document Origin, Cost Center, Invoice Amount, RA Number, Bus Group, Product Line, Product ID, Product Description, Serial Number, Invoice Number, Order Number, Quantity, Line Total, Invoice Total, Discount Amount, Freight Amount, Other Amount, Claim Amount, Payment Amount, Write-off, Outstanding Amount, PO Number, Buyer Code, Vendor Code, Authorization Number, E-mail Sent to, Freight Bill Document, Invoice Document, Carrier Claim Form, Bill of Lading Document, Air Waybill, Credit Memo, Debit Memo, PO Number, Photographs, Bill of Lading - GEERC, Tracking Number, Client Reference number, Acknowledgements, Invoice #, Correspondence, Authorization Comment, Container Size, Detailed Summary Results, 551 Document, Claim Documents, Commercial Invoice, Control Sheet - GEERC, Delivery Receipt Document, Order Number, Customer Original Receipt, Certified Mail Document #, Invoice - Material, and Load Number. The report provides record selection options for a Company Range, Consignee Range, Filed Date range, Status Code, Status Type, and Claim Types (multiple).

### **Export Format - Detail Report of Claims By Claimant**

This report provides a listing of claims for the specified criteria. This report breaks out the claims by company, claimant and then date created. The report includes Company Code, Company Name, Claimant Code, Claimant Name, Shipper Code, Shipper Name, Shipper State, Consignee Name, Consignee Code, Consignee State, Claim Number, Claim Rep, Carrier Name, Status, Claim Type, Age, Created Date, Filed Date, Closed Date, Product ID, Product Description, Quantity, Freight Bill Pro Number, Reason, Claim Amount, Payment Amount, Outstanding Amount, Cost Center, PO Number, Buyer Code, Vendor Code, Authorization Number, and E-mail Sent to. The report provides record selection options for a Company Range, Claimant Range, Created Date range, Status Code, Status Type, and Claim Types (multiple).

### **Export Format - Detail Report of Claims By Diary Notes Category**

This report provides a listing of claims for the specified criteria. This report breaks out the claims by claim status, diary note type, company name, and then claim number. The report includes claim number, company, diary date, diary note, vendor number, vendor name, vendor address, vendor phone, amount, claim rep, carrier, claimant, filed date, recovered amount, and subrogation status. The report provides record selection options for a Company Range, Carrier Range, Claimant Range, Filed Date range, Diary Date range, Diary Note Category, Status Code, Status Type, and Claim Types (multiple).

### **Export Format - Detail Report of Claims By Freight Bill Pro**

This report provides a listing of claims sorted by Company and Freight Bill Pro Number. The report includes the Freight Bill Pro Number, In or Outbound, Claim #, Trans Mode, Claim Age, Status Code, PO Number, Claim Rep, Company Name, Carrier/Vendor Name, Delivery Date, Reason Code, Consignee Name, Ship to Country, BOL date, Shipper Name, Last update, Total Claim Amount, Paid Amount, Write Off Amount, and Invoice Number. The report provides record selection options for Carrier range, Consignee range, Filed Date range, Status Code, Status Type, and Claim Types (multiple).

### **Export Format - Detail Report of Claims By SKU/Reason**

This report provides a listing of claims sorted by Company, SKU, Reason, and Claim Number. The report includes the SKU, Company, Carrier, Reason, Status, Claim Number, Filed Date, Claim Type, Product Description, Quantity, Claim Amount, and email sent to. The report includes totals of reason by SKU, totals for SKU, totals for Company, and grand totals. The report provides record selection options for Company range, Claimant range, SKU/Product range, Filed Date range, Status Code, Status Type, and Claim Types (multiple).

### **Export Format - Detail Report of Claims By Status**

This report provides a listing of claims that meet the selected criteria. The report includes the Claim Number, Claimant, Carrier, Claim Reason, Claim Amount, Payments, Outstanding, File Date, Last Update, and Days Old. The report

provides record selection options for Company range, Carrier range, Filed Date range, Status Code, Status Type, and Claim Types (multiple).

#### **Export Format - Detail Report of Claims By Status and Diary**

This report provides a listing of claims that meet the selected criteria. The report includes the Claim Number, Claimant, Carrier, Claim Reason, Claim Amount, Payments, Outstanding, File Date, Last Update, Days Old, Last Diary Date, and Last Diary Entry. The report provides record selection options for Company range, Carrier range, Filed Date range, Status Code, Status Type, and Claim Types (multiple).

#### **Export Format - Detail Report of Claims Filed and Recovered**

This report provides a listing of claims, sorted by Company and then Claim Number. The report includes the Company, Claim Number, Vendor/Carrier, Claimant, Consignee, Shipper, AR #, Claim reason, Claim Amount, BOL Date, Filed Date, Delivery Date, Recovered Amount, Date Recovered, Write Off Amount, Date Write-Off, Balance, Status, PCT %, PO Number, Buyer Code, Vendor Code, Authorization Number, and email sent to. The report provides record selection options for the Company range, Carrier range, Claimant Range, Filed Date range, Status Code, Status Type, and Claim Types (multiple).

#### **Export Format - Detail Report of Claims Filed and Recovered with Documents**

This report provides a listing of claims that meet the selected criteria. The report includes the Claim Number, Vendor/Carrier, Shipper, Consignee, Filed Date, Claim Amount, Date Recovered, Recovered Amount, Balance, Claim Reason, AR #, Status, and Domestic/International. The report provides record selection options for the Company range, Carrier range, Claimant Range, Filed Date range, Status Code, Status Type, up to three Document Types, Domestic/International, and Claim Types (multiple).

#### **Export Format - Detail Report of Outstanding Claims By Amount**

This report provides a listing of claims, sorted by Company and then Claim Amount. The report includes the Company Code, Company Name, Claim Number, Carrier, Freight Bill Pro #, Carrier Claim Number, Shipper, Consignee, Claim Reason, Outstanding Amount, Date Filed, Days Old, and Last Diary Comment. The report provides record selection options for the Company range, Carrier range, Created Date range, up to three Document Types, and Claim Types (multiple).

#### **Export Format - Paid Claims Report**

This report provides a listing of paid claims, sorted by Company and then Claim Number. The report includes the Company, Claim Number, Status, Carrier/Vendor, Claimant, Delivery Carrier, Consignee, Reason, Document Origin, AR Number, Filed Date, Delivery Date, Claim Amount, Total Payments, Write-Off Amount, Payment Amount, Check Number, Check Date, Payment Date, Transaction No, Transaction Date, Payment Type, Comments, PO Number, Buyer Code, Vendor Code, Authorization Number, and email sent to. The report provides record selection options for the Company range, Carrier range, Claimant Range, Payment Date Range, Status Code, Status Type, and Claim Types (multiple).

#### **Export Format - Security Detail Report - User Account Audit Report**

This report provides a listing of users, sorted by Full Name. The report includes the Full Name, Employee ID, Logon Name, Email Address, IsActive, Last Logon, Profile, Companies, Updated By and Last Updated. The report provides record selection options for the Company range and Last Logon Date range.



### Export Format - Journal Entry

This report provides a listing of paid claims, sorted by Company Code and then Claim Number. The report includes the Company Code, Payment Amount, Claim Number, Claim Type, Carrier, Check Number, Check Date, Payment Date, PO Number, and JE Code. The report provides record selection options for the Company range and Payment Date range.

### File Transfer Report

This report provides a listing of file transfers. The report includes the Message ID, Message, email Address, Input Date, filename, and indicates if there was an error in the transfer. The report provides record selection options for the Created Date range.

### Write - Off Report

This report provides a listing of write-off claims, sorted by Company, Carrier, and then Claim Number. The report includes the Company, Claim Number, Carrier, Consignee, BOL Date, Created Date, Filed Date, Claim Amount, Total Paid, Write-off Amount, Write-off Date, and Write Off Reason. The report includes totals by company for each carrier, totals for each company, and grand totals. The report provides record selection options for the Company range, Carrier range, Write-off Date range, and Claim Types (multiple).

### Write - Off Report By Carrier/Reason

This report provides a listing of write-off claims, sorted by Company, Carrier, Reason, and then Claim Number. The report includes the Company, Carrier, Reason, Claim Number, Consignee, Created Date, Filed Date, Claim Amount, Total Paid, Write-off Amount, Write-off Date, and Write Off Reason. The report includes totals by company for each carrier and reason, totals for each company, and grand totals. The report provides record selection options for the Company range, Carrier range, Write-off Date range, and Claim Types (multiple).

## RUNNING DETAIL REPORTS— MANAGEMENT REPORTS

The following steps are an overview of printing management reports. Not all reports will have the boxes.

1. Click the **Reports** group tab.
2. Click the **Detail Reports** button. The Detail Reports page opens.
3. Click the report you want to run. The **Report Criteria** dialog box opens.

### Company Ranges

4. In the **Company From** and **Company To** boxes, enter a range of company names. You can enter complete names, partial names, or just letters, such as A to M. You can leave these boxes blank to print all companies.

### Carrier Ranges

5. In the **Carrier From** and **Carrier To** boxes, enter a range of carrier names. You can enter complete names, partial names, or just letters, such as A to M. You can leave these boxes blank to print all carriers.

### Date Ranges

The reports use a number of various date range options when generating reports: Filed Date, Cancelled Date, Denied Date, Write-Off Date, Current Period, Reporting Period, and Payment Date.

6. Enter a range of dates in the **From** and **To** boxes. These ranges are inclusive, dates that are either equivalent to, or between the **From** and **To** values, are included in the report.

### Year-to-Date Ranges

7. Enter the **From** date in the **Year-to-Date Range: From** box. The **To** date is one year from the **From** date you entered. Dates that are either equivalent to, or between the **From** and **To** values, are included in the report.

*Status Code*

8. Select the **Status Code** from the list. Leave blank to select all.

*Status Type*

9. Select the **Status Type** from the list. Leave blank to select all.

*Product Ranges*

10. In the **Product From** and **Product To** boxes, enter a range of Product names. You can enter complete names, partial names, or just letters, such as A to M. You can leave these boxes blank to print all carriers.
11. In the **Product ID From** and **Product ID To** boxes, enter a range of Product IDs.

*Company (Multiple)*

12. In the **Company (Multiple)** box, select the company. To select more than one company, hold the CTRL key down while clicking on the company names. To select all companies, just leave the companies unselected.

*Region (Multiple)*

13. In the **Region (Multiple)** box, select the region. To select more than one region, hold the CTRL key down while clicking on the region names. To select all regions, just leave the regions unselected.

*Business Group (Multiple)*

14. In the **Business Group (Multiple)** box, select the business group. To select more than one business group, hold the CTRL key down while clicking on the business group names. To select all business groups, just leave the business groups unselected.

*Carrier SCAC (Multiple)*

15. In the **Carrier SCAC (Multiple)** box, select the carrier SCAC. To select more than one carrier SCAC, hold the CTRL key down while clicking on the carrier SCACs. To select all carrier SCACs, just leave the carrier SCACs unselected.

*Product Lines (Multiple)*

16. In the **Product Lines (Multiple)** box, select the product line. To select more than one product line, hold the CTRL key down while clicking on the product lines. To select all product lines, just leave the product lines unselected.

*Reason Ranges*

17. In the **Reason From** and **Reason To** boxes, enter a range of Product IDs.

*Delivery Formats*

18. Select the **Delivery Format** from the list. The reports have several different delivery formats: Adobe Acrobat PDF (\*.pdf), Microsoft® Excel (\*.xls), Internet HTML (\*.htm), and Rich Text Format (\*.rtf). Adobe Acrobat PDF (\*.pdf) is the default.
19. Click the **Run** button. The reports open in the selected delivery format. You can review the reports and print them.



**NOTE:** Instead of clicking the **Run** button, you can click the **Send By Email** button to send the report via email. Clicking the **Send By Email** button will open an email dialog box for you to enter the email address(es) and a message.

## GRAPHS REPORTS

All Graphs Reports show a graphical representation of the criteria in an Excel spreadsheet. These reports also provides the data used to draw the graphs.

### Top 10 Carriers With Greatest Claim Count

This report provides a listing of the top 10 carriers with the highest claim count for the period specified. The report list the carrier name, claim count, and the total amount of the claims. The claim count by carrier is also shown in a graph. The report provides record selection options for Filed Date range, Company (multiple), and Claim Type (multiple).

### Top 10 Carriers With Greatest Claim Amount

This report provides a listing of the top 10 carriers with the highest claim amount for the period specified. The report list the carrier name, total amount of the claims, and the total claim count. The claim amount by carrier is also shown in a graph. The report provides record selection options for Filed Date range, Company (multiple), and Claim Type (multiple).

## RUNNING GRAPHS REPORTS

1. Click the **Reports** group tab.
2. Click the **Graphs Reports** button. The Graphs Reports page opens.
3. Click the report you want to run. The **Report Criteria** dialog box opens.

4. In the **Filed Date From** and **Filed Date To** boxes, enter a date range or accept the defaults. The defaults are for the current month.
5. In the **Company (multiple)** box, select the company. To select more than one company, hold the CTRL key down while clicking on the company names. To select all companies, just leave the companies unselected.
6. In the **Claim Types (multiple)** box, select the claim type. To select more than one claim type, hold the CTRL key down while clicking on the claim types. To select all claim types, just leave the claim types unselected.

- Click the **Run** button. The report opens in an Excel spreadsheet format. You can review the reports and print them.



**NOTE:** Instead of clicking the **Run** button, you can click the **Send By Email** button to send the report via email. Clicking the **Send By Email** button will open an email dialog box for you to enter the email address(es) and a message.

## ADDRESSES REPORTS

All Addresses Reports include the same information: Name/eMail, Address, Contact/Phone/Fax and eMail/Last Update. The reports are sorted by Name. You can print an Addresses Report for any of the business types used. This report also provides a range option for the business names, allowing you to generate a report for specific businesses.

### RUNNING ADDRESSES REPORTS

- Click the **Reports** group tab.
- Click the **Addresses Reports** button. The Address Reports page opens.
- Click the report you want to run. The **Report Criteria** dialog box opens.

- In the **From** and **To** boxes, enter a range of carrier, claimant, company, consignee, or shipper names based on the report you selected. You can enter complete names, partial names, or just letters, such as A to M. You can leave these boxes blank to print all.
- In the **Display My List** box, select Yes if you only want to see your list. By default, this is set to No.
- Select the **Delivery Format** from the list.

- Click the **Run** button. The report opens in the selected delivery format. You can review the reports and print them.



**NOTE:** Instead of clicking the **Run** button, you can click the **Send By Email** button to send the report via email. Clicking the **Send By Email** button will open an email dialog box for you to enter the email address(es) and a message.

## LOOKUP REPORTS

All Lookup Reports include the same information: Code, Display, Updated By, and Last Update. You can print a Lookup Listing report for any of the lookup values. These reports also provide a range option for the display, allowing you to generate a report for specific lookup values.

### RUNNING LOOKUP REPORTS

- Click the **Reports** group tab.
- Click the **Lookup Reports** button. The Lookup Reports page opens.
- Click the report you want to run. The **Report Criteria** dialog box opens.

- In the **Code From** and **Code To** boxes, select a range for the code. You can leave these boxes blank to print all.
- Select the **Delivery Format** from the list.
- Click the **Run** button. The report opens in the selected delivery format. You can review the reports and print them.



**NOTE:** Instead of clicking the **Run** button, you can click the **Send By Email** button to send the report via email. Clicking the **Send By Email** button will open an email dialog box for you to enter the email address(es) and a message.

## REPORTS SCHEDULER

The Report Scheduler allows you to schedule the running of reports and have them emailed to the people of your choice at specified times. This allows you to keep up to date with the reported information in MyEZClaim without having to actually open the application.

### ADDING A SCHEDULED REPORT

1. Click the **Reports** group tab.
2. Click the **Reports Scheduler** button. The Reports Scheduler page opens.
3. Click the Add button. The **Report Scheduler** dialog box opens.

Report Scheduler - Internet Explorer provided by Dell

http://test2008.myezclaim.com/MyEZClaimNet/Navigation/Reports/Pages/ReportScheduler\_Popup.aspx?targetId=0&reportId=0

**Report Scheduler**

Scheduler Settings | Email Subscriber | Report Parameters | Delete | Save

report name: Cancel Codes

user: Heather Munion

start date: 1/5/2009

running time: 8 : 30 : 00 AM

interval: ☒ Every Day ☐ Every Month  
☐ Every Week ☐ Every Year  
☐ Every Fortnight ☐ Custom Interval

4. Select the report you want to schedule from the **Report Name** drop-down list. This list includes all reports.
5. In the **User** drop-down list, select the MyEZClaim user that will get the scheduled report by email.



**NOTE:** You can specify other users in the **Email Subscriber** tab. If you would like to add additional recipients for the report, click the **Email Subscriber** tab and add the additional emails. You will need to save the scheduled report before you can begin adding more email subscribers

6. In the **Start Date** field, enter the date that you want the reports to start running.
7. In the **Running Date**, enter the time that you want the emails sent. This time is based on the server time.
8. In the **Interval** section, select the frequency for the reports.

9. Click the **Report Parameters** tab.

The screenshot shows a web browser window titled "Report Scheduler - Internet Explorer provided by Dell". The address bar shows the URL: [http://test2008.myezclaim.com/MyEZClaimNet/Navigation/Reports/Pages/ReportScheduler\\_Popup.aspx?targetId=0&reportId=0](http://test2008.myezclaim.com/MyEZClaimNet/Navigation/Reports/Pages/ReportScheduler_Popup.aspx?targetId=0&reportId=0). The page has a tabbed interface with three tabs: "Scheduler Settings", "Email Subscriber", and "Report Parameters". The "Report Parameters" tab is currently selected. To the right of the tabs are buttons for "Delete" and "Save", and a "Test" link. Below the tabs is a table with two columns: "Parameter Name" and "Parameter Value". The table contains the following rows:

Parameter Name	Parameter Value
server	<input type="text"/>
accountId	<input type="text"/>
userId	<input type="text"/>
companyList	<input type="text"/>
businessGroupList	<input type="text"/>
reportingPeriodDate	BOY - Beginning of year
claimTypeList	Loss and Damage Overcharge Return Authorization Vendor
claimTypeText	<input type="text"/>
businessGroupText	<input type="text"/>

At the bottom right of the table area is a "Previous" link. The browser's status bar at the bottom shows "Done", "Internet | Protected Mode: On", and a zoom level of "100%".

The fields shown on the Report Parameters tab are specific to the selected claim. Some report parameters require specific knowledge of the database such as Server, AccountID, and UserID. Contact your MyEZClaim administrator to obtain the information you need for these fields.

The majority of these fields are identical to the parameters that are required when you run the report manually.

A **Test** link is available to test the report to see what it will look when it is emailed.

## AD HOC REPORTS

The Ad Hoc Report allows you to create custom reports. You can then share them with all users or leave them so that only you and the site administrator have access to them. When you click on the Ad Hoc Report button, you are shown a list of all custom report that you have access to.

### CREATING AN AD HOC REPORT

1. Click the **Reports** group tab.
2. Click the **Ad Hoc Report** button. The Ad Hoc Report page opens.

Member: myEZClaim® Administrator | Company: Demo Company | Access Level: Site Administrator  
Home | Help | Logout

My Account | Claims | **Reports** | Tasks | Administration | Dashboard

**Reports**

- » Outstanding Reports
- » Detailed Reports
- » Graphs Reports
- » Addresses Reports
- » Lookup Reports
- [+] Letters
- » Reports Scheduler
- » Ad Hoc Report**

**Ad Hoc Report**

Reports | Report Filters | Report Fields | Report Options

Displaying Page 1 of 1 (Records 1 to 2 of 2) Add

report name	filter	public	created date	created by		
Detail Report using Ad Hoc Report	Total Claim Amount > 500	✓	07/12/2009	Jane Demo	go	✗
Detail Report of Claims by Dom/ Int.with Add'l column	(basic filter)	✓	08/08/2009	Jane Demo	go	✗

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3. Click the **Add** button. The Report Filters tab is shown.
4. Select the filter option you want to use.

You can use the Basic Filter option or the Advanced Filter option. By default, the Basic Filter option is selected. The Basic Filter option is the easiest to use and the Advanced Filter options works just like the Filter View feature for claims. Follow the instructions for the option you selected.



### Basic Filter Option

The Basic Filter option allows you to filter on the dates the claims were created, the claim type, and the claim status.

The screenshot shows the 'Ad Hoc Report' interface with the 'Report Filters' tab selected. Under the 'Basic Filter' section, there are three filter criteria: 'claim created date', 'claim type', and 'claim status'. The 'claim created date' filter includes a dropdown menu set to '<All>', and two input fields for 'from' and 'to' dates, each with a calendar icon. An 'Explain' link is next to the dropdown. The 'claim type' and 'claim status' filters each have a dropdown menu set to '<All>'. At the bottom right of the filter area, there are two blue arrows pointing left and right.

- In the **Claim Created Date** drop-down list, select **<All>** to search all dates OR select **Between** to specify a range of create dates. **<All>** is the default.
- In the **Claim Type** drop-down list, select the claim type you want to include in the report. **<All>** is the default.
- In the **Claim Status** drop-down list, select the claim status you want to include in the report. **<All>** is the default.

### Advanced Filter Option

The Advanced Filter option allows you to filter on any fields in a claim. You can build very complex searches using this filtering option.

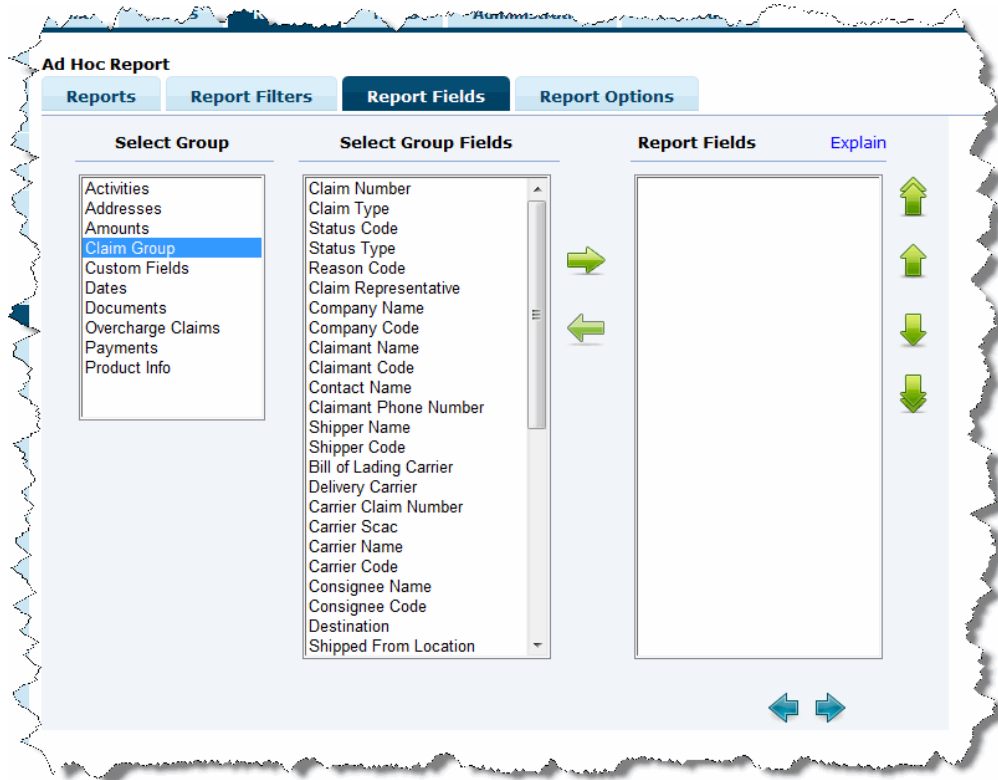
- ▣ From the **Field Name** list, select the field on which you want to filter.
- ▣ From the **Operator** list, select the search operator you want to use.
- ▣ Select the sort order desired (Ascending or descending).
- ▣ Select the concatenation desired (And or Or). This allows you to filter for claims that meet several requirements. See examples.
- ▣ Move to the **Criteria** box and enter the search criteria.
- ▣ Click the **Add** button to add the item to the search criteria.

#### Examples:

To search for all of the claims that have a Claim ID that begins with **LD**, select **Claim Number** from the **Field Name** list, and select **like ('?' - single or '\*' - multiple)** from the **Operator** list, and then enter **LD\*** in the **Criteria** box and click the **Add** button. When the report is run, each claim that has a Claim ID that begins with the letters "LD" will be shown on the report.

To search for claims that have been modified or created on 10/8/2006, select **Date Created** from the **Field Name** list and select **= (value is equal to)** from the **Operator** list, and then enter **10/8/2006** in the **Criteria** box. When you click the **Add** button, The search criteria is shown in the **Show me all claims where** section. Select **Last Modified** from the **Field Name** list, then select **= (value is equal to)** from the **Operator** list, Select **Or** for **Concatenation** and then enter **10/8/2006** in the **Criteria** box. Click the **Add** button. Each claim that has been last modified on or created on 10/8/2006 will be shown on the report.

5. Once you have completed setting up your report filters, click the **Report Fields** tab.  
The Report Fields tab is where you select the fields that will be printed in your report.



6. In the **Select Group** column, select a group that has a field you would like to have printed in your report. By default, the **Claim Group** is selected.
7. In the **Select Group Fields** column, select the field(s) you would like to have in your report.
8. Click the right green arrow button to move the field into the **Report Fields** column. The Report Fields column is a list of all fields that will be included in your report. To remove a field from the Report Fields column, select the field in the Report Fields column and click the left green arrow button.

**Button**

**How it moves the field**



Moves the selected field from the **Select Group Fields** column into the **Report Fields** column.

To use this button, click a field name shown in the **Select Group Fields** column. Click the arrow and the field will move into the **Report Fields** column.



Moves the selected field out of the **Report Fields** column.

To use this button, select a field in the **Report Fields** column and then click the arrow.

9. Once all of the fields for the report are listed in the Report Fields column, use the up and down arrows to order the fields.

**Button****How it moves the field**

Moves the selected field to the top of the **Report Fields** column.

To use this button, select a field in the **Report Fields** column and then click the arrow. The field will move to the top of the column.



Moves the selected field up one field in the **Report Fields** column.

To use this button, select a field in the **Report Fields** column and then click the arrow. The field moves up one on the column.



Moves the selected field down one field in the **Report Fields** column.

To use this button, select a field in the **Report Fields** column and then click the arrow. The field moves down one on the column.



Moves the selected field to the bottom of the **Report Fields** column.

To use this button, select a field in the **Report Fields** column and then click the arrow. The field will move to the bottom of the column.

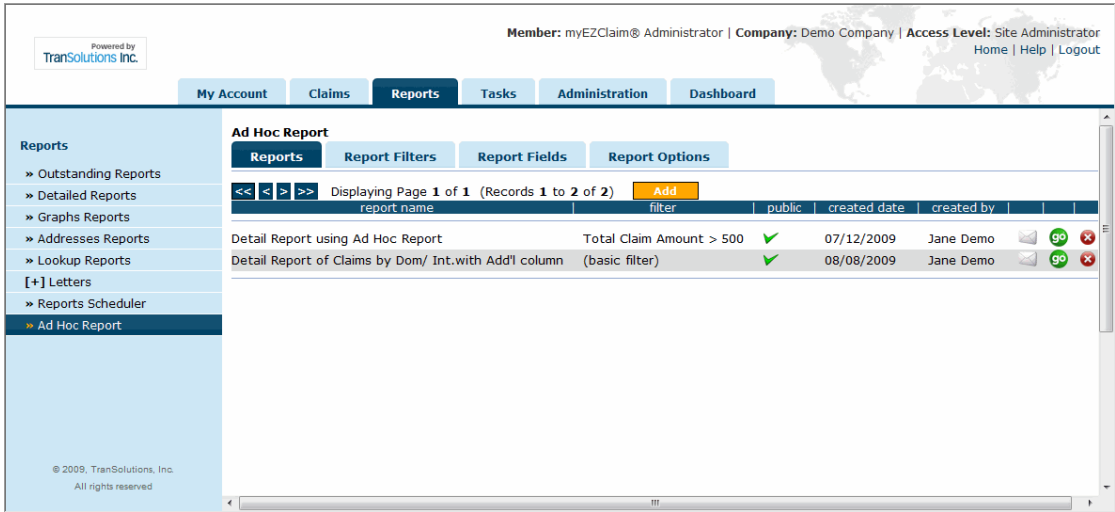
10. Once you are done, click the **Report Options** tab.

The screenshot shows the 'Ad Hoc Report' configuration window with the 'Report Options' tab selected. The interface includes sections for 'Save Options', 'Sorting Options', and 'Header Options'. In the 'Save Options' section, 'Report Access' is set to 'public' (radio button selected), and there is a 'Report Name' text field and a 'Save' button. In the 'Sorting Options' section, 'Sort By' is a dropdown menu, and 'Sort In' has radio buttons for 'ascending order' (selected) and 'descending order'. In the 'Header Options' section, there are checkboxes for 'Print Date' and 'Print Time', both of which are currently unchecked. At the bottom right, there is a 'go' button with an envelope icon and two blue arrow buttons.

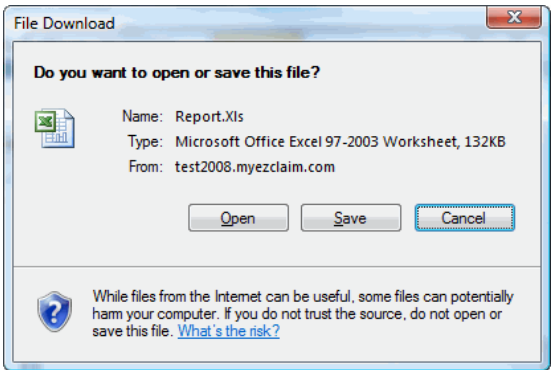
11. Select the **Report Access** for the report. **Public** allows all users access to the report. **Private** makes the report available only to you and the Site Administrator(s). By default, the report access is set to **Public**.
12. In the **Report Name** field, enter a descriptive name for the report.
13. In the **Sort By** field, select a field to sort by.
14. For the **Sort In** option, select the sort type.
15. In the **Header Options** section, select the information you want to be included in the report. By default, these options are not checked. Click the **Save** button to save the report. You can now run the report.

PRINTING AN AD HOC REPORT

1. Click the **Reports** group tab.
2. Click the **Ad Hoc Report** button. The Ad Hoc Report page opens.



3. Click the **Go** button next to the report you want to run. The File Download dialog box opens.



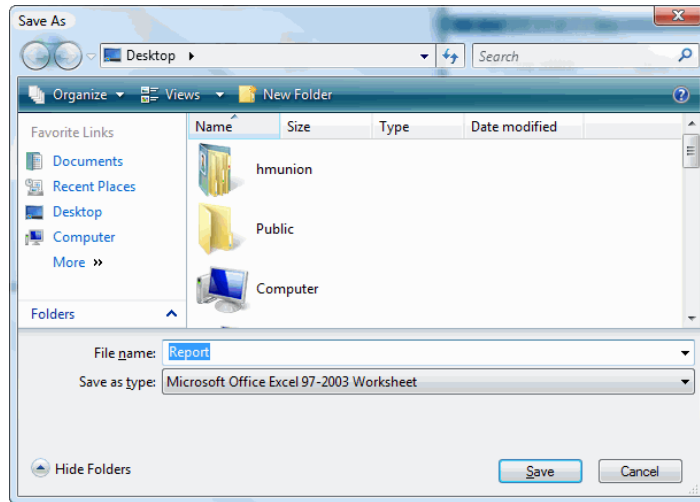
- You can open the file or save it.

- ▣ **Opening the File**

- Click the **Open** button. The file opens in MS Excel. you can then print or save the file in MS Excel.

- ▣ **Saving the File**

- Click the **Save** button. The Save As dialog opens.



- Select a location to save the file.
      - In the **File Name** field, enter a name for the file.
      - Click the **Save** button.

## EMAILING AN AD HOC REPORT

- Click the **Reports** group tab.
- Click the **Ad Hoc Report** button. The Ad Hoc Report page opens.

Powered by  
TransSolutions Inc.

Member: myEZClaim® Administrator | Company: Demo Company | Access Level: Site Administrator  
Home | Help | Logout

My Account | Claims | **Reports** | Tasks | Administration | Dashboard

**Reports**

- » Outstanding Reports
- » Detailed Reports
- » Graphs Reports
- » Addresses Reports
- » Lookup Reports
- [+] Letters
- » Reports Scheduler
- » Ad Hoc Report**


**Ad Hoc Report**

Reports | Report Filters | Report Fields | Report Options

<< < > >> Displaying Page 1 of 1 (Records 1 to 2 of 2) Add

report name	filter	public	created date	created by		
Detail Report using Ad Hoc Report	Total Claim Amount > 500	✓	07/12/2009	Jane Demo	✉	90
Detail Report of Claims by Dom/ Int.with Add'l column	(basic filter)	✓	08/08/2009	Jane Demo	✉	90

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3. Click the **email** button  next to the report you want to email. The email message dialog is shown with the report attached.

myEZClaim® Email Properties - Internet Explorer provided by Dell

http://test2008.myezclaim.com/Navigation/Reports/Pages/SendReportEmail.aspx?reportPath=/ClaimForms/6/2009/Septeml

**myEZClaim® Email Message** Send Close

Please enter valid email addresses, i.e. "name@company.com", separated with a comma.

**Recipients**

**to...:**

**cc...:**

**bcc...:**

**from:** noreply@myezclaim.com

**subject:** Detail Report using Ad Hoc Report Ad-Hoc Report

**attachment:** [Report.Xls](#)

Double click to change security s

Internet | Protected Mode: On

4. You can type the e-mail addresses in the To, CC:, and BCC boxes or click one of the buttons to select an email address from the list.
- ▣ **Recipients** button. Click the **Recipients** button to select an address. The Recipients dialog box opens. This dialog box has a listing of all email addresses entered as Recipients. (See *“Working with E-mail Recipients”* for more information.)
5. By default, the **From** field has an email address already in it. If the people receiving the email should not reply to the email address shown, enter a corrected email address.
6. By default, the **Subject** field contains the name of the report followed by the words “Ad Hoc Report”. You can enter a different subject in the **Subject** field.
7. Enter a note for the e-mail in the big box below the attachment.
8. Click the **Send** button to send the e-mail.

## EDITING AN AD HOC REPORT

1. Click the **Reports** group tab.
2. Click the **Ad Hoc Report** button. The Ad Hoc Report page opens.

Member: myEZClaim® Administrator | Company: Demo Company | Access Level: Site Administrator  
Home | Help | Logout

My Account | Claims | **Reports** | Tasks | Administration | Dashboard

**Reports**

- » Outstanding Reports
- » Detailed Reports
- » Graphs Reports
- » Addresses Reports
- » Lookup Reports
- [+] Letters
- » Reports Scheduler
- » Ad Hoc Report**

**Ad Hoc Report**

Reports | Report Filters | Report Fields | Report Options

<< < > >> Displaying Page 1 of 1 (Records 1 to 2 of 2) Add

report name	filter	public	created date	created by		
Detail Report using Ad Hoc Report	Total Claim Amount > 500	✓	07/12/2009	Jane Demo	90	✗
Detail Report of Claims by Dom/ Int.with Add'l column	(basic filter)	✓	08/08/2009	Jane Demo	90	✗

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3. Click the report you want to edit.
4. Go through the tabs and make any necessary changes.
5. Click the **Report Options** tab and click the **Save** button to save the changes.

## DELETING AN AD HOC REPORT

1. Click the **Reports** group tab.
2. Click the **Ad Hoc Report** button. The Ad Hoc Report page opens.

Member: myEZClaim® Administrator | Company: Demo Company | Access Level: Site Administrator  
Home | Help | Logout

My Account | Claims | **Reports** | Tasks | Administration | Dashboard

**Reports**

- » Outstanding Reports
- » Detailed Reports
- » Graphs Reports
- » Addresses Reports
- » Lookup Reports
- [+] Letters
- » Reports Scheduler
- » Ad Hoc Report**


**Ad Hoc Report**

Reports | Report Filters | Report Fields | Report Options

<< < > >> Displaying Page 1 of 1 (Records 1 to 2 of 2) Add

report name	filter	public	created date	created by		
Detail Report using Ad Hoc Report	Total Claim Amount > 500	✓	07/12/2009	Jane Demo	90	✗
Detail Report of Claims by Dom/ Int.with Add'l column	(basic filter)	✓	08/08/2009	Jane Demo	90	✗

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3. Click the 'x' button  that is in the row for the selected report. A dialog opens asking if you really want to delete the report. Click **OK** to delete the report.



# IMPORTING CLAIMS FROM EXCEL

MyEZClaim allows you to import a maximum of 1,000 Loss and Damage claims from a Microsoft Excel spreadsheet. For the import template, contact your myEZClaim administrator. The following is a description of required data in the required order:

## IMPORT FIELDS

### Claim ID

#### *Required*

The claim ID is required to import a claim. If you would like to have the claim numbers created automatically, you can specify the two of three character claim ID identifier and have myEZClaim automatically number the claims by entering the “#” character after the claim ID identifier. For example: If you wanted the claim ID to begin with “LD” in the claim ID field you would enter LD#

### Status

#### *Required*

The Status is required to import a claim. The only accepted values are: Closed, Open, and Pending. If the Status field does not contain one of these values when importing the claim, an error message will be shown and the claim will not import.

### Reason

#### *Required*

The Reason is required to import a claim. The Reason should match one of the Reason lookups for your company. If the Reason entered in the Reason field does not match one of the Reason lookups, the claim will not import and an error message will be shown.

### Claim Rep

The Claim Rep field should be the name of the person responsible for following up on the claim.

### Company Code

*Conditionally required - this is only required if the Company is blank.*

The code for the Company. If the Company Code is blank, the name of the Company is required. If the Company Code field and the Company Name field are blank, the claim will not import and an error message will be shown stating why the claim did not import.

### Company

*Conditionally required - this is only required if the Company Code is blank.*

The name of the Company.

### Claimant Code

*Conditionally required - this is only required if the Claimant is blank.*

The code for the Claimant. If the Claimant Code is blank, the name of the Claimant is required. If both of the Claimant Code and the Claimant fields are blank, the claim will not import and an error message will be shown stating why the claim did not import.

**Claimant**

***Conditionally required - this is only required if the Claimant Code is blank.***

The name of the Claimant for the Claim. This information is only required if the Claimant Code field is blank. If the Claimant does not exist in myEZClaim, the Claimant is created in myEZClaim with an auto-generated Claimant Code. The auto-generated Claimant Code will start with “CL” and be a total of ten characters long. Example: CL00000001. If both of the Claimant Code and the Claimant fields are blank, the claim will not import and an error message will be shown stating why the claim did not import.

**Shipper Code**

***Conditionally required - this is only required if the Shipper is blank.***

Code for the Shipper. If the Shipper Code is blank, the name of the Shipper is required. If both of the Shipper Code and the Shipper fields are blank, the claim will not import and an error message will be shown stating why the claim did not import.

**Shipper**

***Conditionally required - this is only required if the Shipper Code is blank.***

The name of the Shipper for the Claim. This information is only required if the Shipper Code field is blank. If the Shipper does not exist in myEZClaim, the Shipper is created in myEZClaim with an auto generated Shipper Code. The auto-generated Shipper Code will start with “SH” and be a total of ten characters long. Example: SH00000001. If both of the Shipper Code and the Shipper fields are blank, the claim will not import and an error message will be shown stating why the claim did not import.

**Customer Code**

***Conditionally required - this is only required if the Customer is blank.***

Code for the Customer. If the Customer Code is blank, the name of the Customer is required. If both of the Customer Code and the Customer fields are blank, the claim will not import and an error message will be shown stating why the claim did not import.

**Customer**

***Conditionally required - this is only required if the Customer Code is blank.***

The name of the Customer for the Claim. This information is only required if the Customer Code field is blank. If the Customer does not exist in myEZClaim, the Customer is created in myEZClaim with an auto generated Customer Code. The auto-generated Customer Code will start with “CU” and be a total of ten characters long. Example: CU00000001. If both of the Customer Code and the Customer fields are blank, the claim will not import and an error message will be shown stating why the claim did not import.

**Carrier Code**

***Conditionally required - this is only required if the Carrier is blank.***

The code for the Carrier. If the Carrier Code is blank, the name of the Carrier is required. If both of the Carrier Code and the Carrier fields are blank, the claim will not import and an error message will be shown stating why the claim did not import.

**Carrier**

***Conditionally required - this is only required if the Carrier Code is blank.***

The name of the Carrier for the Claim. This information is only required if the Carrier Code field is blank. If the Carrier does not exist in myEZClaim, the Carrier is created in myEZClaim with an auto-generated Carrier Code. The auto-generated Carrier Code will start with “CA” and be a total of ten characters long. Example: CA00000001. If both of the Carrier Code and the Carrier fields are blank, the claim will not import and an error message will be shown stating why the claim did not import.

**Delivery Carrier**

The name of the 3<sup>rd</sup> party delivery carrier.

**Vehicle #**

The vehicle number can be the container or trailer box number.

**A/R #**

The A/R ledger number assigned to the claim by accounting for the carrier receivable.

**Document Origin**

The origin of the claim documentation.

**Shipped From**

If the shipment was made from a location other than that shown for the Shipper, enter the address from which the shipment was actually made.

**BOL Date**

The date of the bill-of-lading

**Date Filed*****Required***

The date that the claim was filed. This information is required to import a claim.

**Product Code**

The code for the product.

**Product Description**

The description of the product.

**Sub Product**

Additional information for the product.

**Quantity**

The quantity of the product.

**Unit Price\$**

The unit price of the product.

**Product Code 1**

The code for the product.

**Product Description 1**

The description of the product.

**Sub Product 1**

Additional information for the product.

**Quantity 1**

The quantity of the product.

**Unit Price\$ 1**

The unit price of the product.

**Product Code 2**

The code for the product.

**Product Description 2**

The description of the product.

**Sub Product 2**

Additional information for the product.

**Quantity 2**

The quantity of the product.

**Unit Price\$ 2**

The unit price of the product.

**Product Code 3**

The code for the product.

**Product Description 3**

The description of the product.

**Sub Product 3**

Additional information for the product.

**Quantity 3**

The quantity of the product.

**Unit Price\$ 3**

The unit price of the product.

**Product Code 4**

The code for the product.

**Product Description 4**

The description of the product.

**Sub Product 4**

Additional information for the product.

**Quantity 4**

The quantity of the product.

**Unit Price\$ 4**

The unit price of the product.

**Product Code 5**

The code for the product.

**Product Description<sup>5</sup>**

The description of the product.

**Sub Product 5**

Additional information for the product.

**Quantity 5**

The quantity of the product.

**Unit Price\$ 5**

The unit price of the product.

**Other Transportation Costs\$**

Enter the applicable freight charges.

**Total Claim\$**

The total amount of the claim.

**Diary**

Diary entry.

**Diary 1**

First diary entry.

**Diary 2**

Second diary entry.

**Diary 3**

Third diary entry.

**Diary 4**

Fourth diary entry

**Diary 5**

Fifth diary entry.

**Payment Date**

*Conditionally required - this is only required if there is a value for Payment Amount.*

This field is required if a Payment is made. If left blank, the claim will not import and an error message will be shown.

**Payment Code**

*Conditionally required - this is only required if there is a value for Payment Amount.*

This field is required if a Payment is made. The Payment Code must match the Payment Code in myEZClaim. If left blank, the claim will not import and an error message will be shown.

**Payment Amount**

Enter the amount of the payment. Payment amount should be shown as 1,200.00 or 1200. If you enter an amount for the payment, you must enter values for the Payment Code and Payment Date.

**Denied Date**

Date that the claim was denied

**Denied Code**

This is the Denied Code from the myEZClaim lookups. If the code is not found in the myEZClaim lookups, the claim will not import and a message will be shown.

**Denied Description**

This is the Denied Description from the myEZClaim lookups.

**Closed Date**

This is the date that the claim was closed. If the claim is a write-off, the Closed Date will be used as the Write-Off Date. If the Claim is a write off AND the Closed Date field is blank, the Closed Date and the Write Off Date will revert to the date of the import. If the Claim is not a write off AND the Status is "Closed" AND the Closed Date field is blank, the Closed Date will revert to the date of the import.

**in/out**

Enter the type of shipment. The type entered must match the drop-down list for in/out on the claim. Examples are: Inbound, Outbound, Transfer, or Return. If "in/out" is blank, it will default to "Return". If the value in the "in/out" field does not exist in myEZClaim, the claim will not import and a message will be shown.

**Trans Mode**

The mode of transportation for the shipment. If "Trans Mode" is blank, it will default to "Home Delv". If the value in the "Trans Mode" field does not exist in the database, the claim will not import and a message will be shown.

**BOL #**

The Bill of Lading number. This will create a Bill of Lading document for the claim.

**Invoice #**

The invoice number. This will create a Bill of Lading document for the claim.

**Pro #**

The Pro number. This will create a Freight Bill Pro # document for the claim.

**Cost Center**

The Cost Center number for the claim.

**Invoice Amount**

The Invoice Amount for the claim. The amount should be shown as 1,200.00 or 1200.

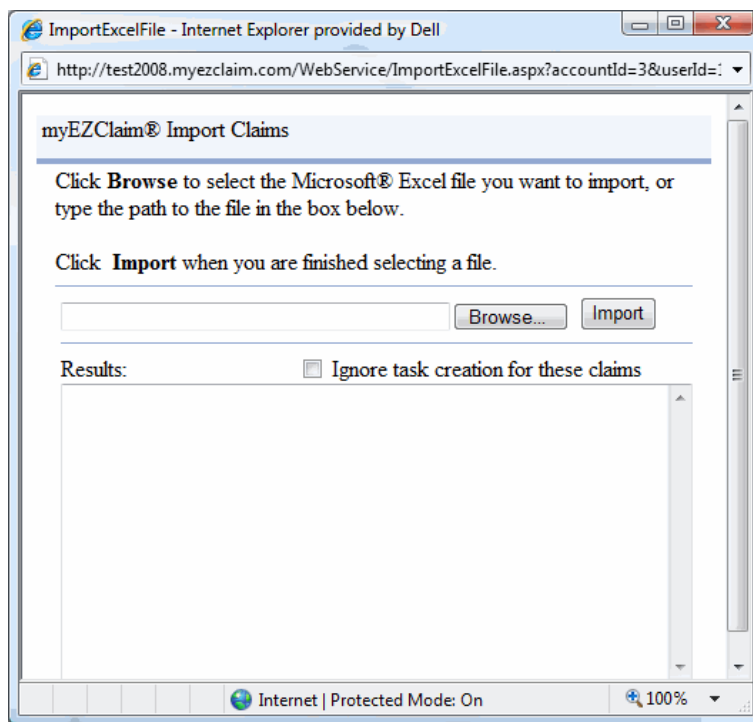
**Delivery Date**

The date of delivery. The date needs to be in the following format: mm/dd/YYYY

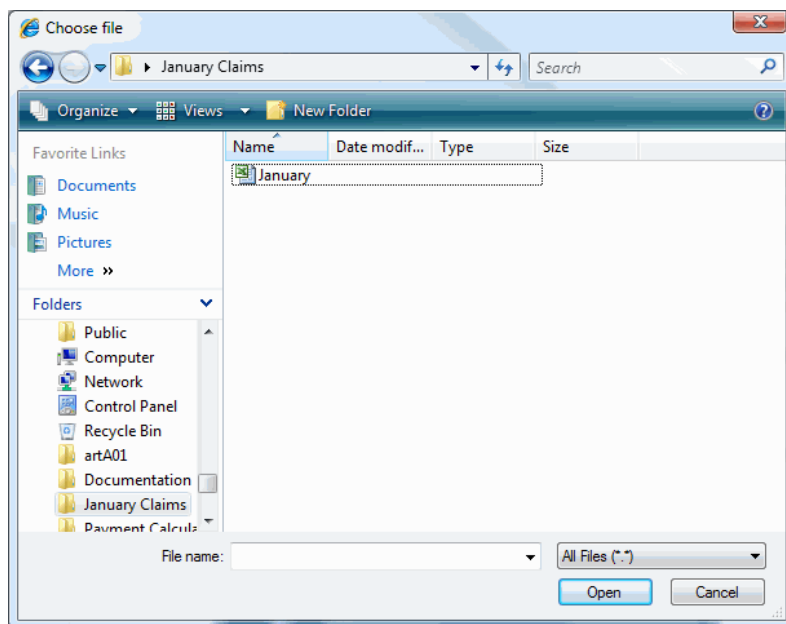
## IMPORTING CLAIMS FROM EXCEL

The following steps are for importing claims from an Excel (.xls) file.

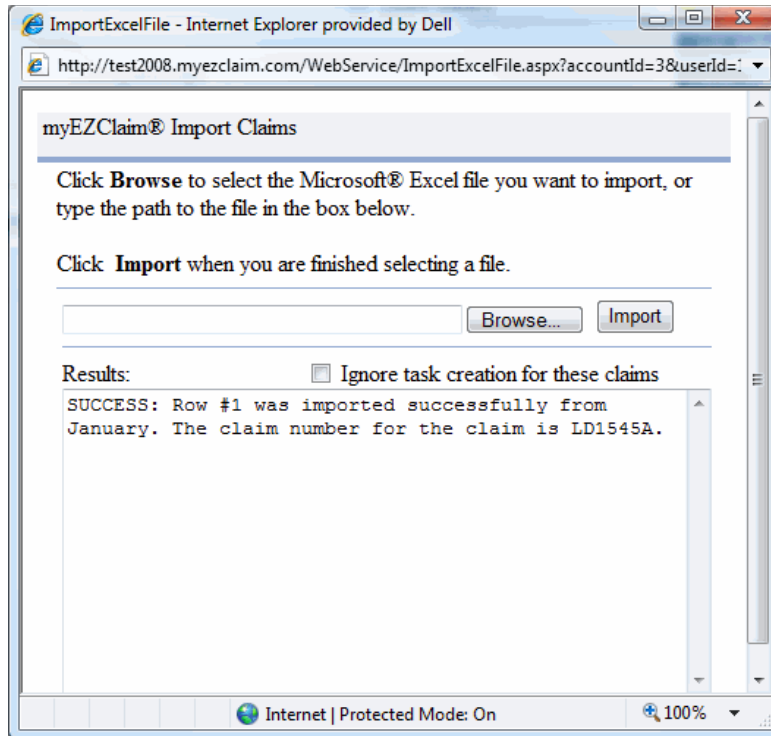
1. Click the **Claims** group tab.
2. Click the **Import From Excel** button. The **Import Claims** dialog box opens.



3. If you do not want tasks created for the claims being imported, check **Ignore task creation for these claims**.
4. Click the **Browse** button. The **Choose File** dialog box opens.



5. Browse to the file you want to import and then double-click on it. The **Choose File** dialog box closes.
6. Click the **Import** button. You may have to wait a couple of minutes while the claims are imported. Once the import is complete, you will have messages in the **Results** section that tell you what claims imported. If there are any errors, correct and re-import only those claims.





This chapter covers administration activities in the myEZClaim application.

## SECURITY

The myEZClaim application makes it easy to manage user security. While you can limit a users ability to do almost anything in myEZClaim, all users have some basic abilities as long as their account is active. All users have the ability to:

- ▣ Create and delete messages.
- ▣ Modify their user account information. Unless the user has the Site Administrator role or Administer Account role, they cannot modify their security roles or the companies that they can access. They cannot change the status of their account or view another user's account information.

### SECURITY CONFIGURATION

The myEZClaim application provides many security options for users. The myEZClaim administrator can configure security that is SOX compliant as well as many options for password complexity and password complexity. The following is a brief explanation of the options available.

#### Configuring security for your account

1. Click the **Registration** shortcut button. The **Registration** dialog box opens.
2. Scroll down to the bottom of the dialog and click the **Security Info** tab. The security options are shown.

The screenshot shows a web-based application window titled "myEZClaim". The window has a tabbed interface with the following tabs: Address, Phone #, Subscription Info, Other Info, Security Info (selected), Letter Templates, and Logo. The Security Info tab is active, displaying a list of security settings with checkboxes and input fields. The settings are as follows:

Setting	Value
enable SOX security:	<input checked="" type="checkbox"/> (Checked = Yes : Unchecked = No)
enable password complexity:	<input type="checkbox"/> (Checked = Yes : Unchecked = No)
password expiration days:	5
password notification days:	5
passwords remember:	5
unused account days:	5
password min length:	5
password max length(<= 12):	5
days to keep login history:	5
number of permitted logins after password expiration:	3
allowed ip for login using signature starts with:	

The window has a status bar at the bottom with the text "Done" on the left, a green checkmark icon in the center, and "Internet | Protected Mode: On" on the right. The zoom level is set to 100%.

The following is a brief explanation of the options listed:

<b>Security Option</b>	<b>Description</b>
<b>Enable SOX Security</b>	Allows you to enable/disable SOX Security for your account.
<b>Enable Password Complexity</b>	Allows you to enable/disable password validation for your account.
<b>Password Expiration Days</b>	Sets the numbers of days from the last password reset before a user will have to change their password.
<b>Password Notification Days</b>	Sets the numbers of days from the last password reset before a user will start receiving notification to change their password.
<b>Passwords Remember</b>	This option prevents a user from using the same passwords as used previously. By setting this option, you are setting how many previous passwords are remembered for a user. This prevents the user from using the same passwords over and over again. Example: If this option is set to “6”, the last six passwords for a user will be remembered. When the user goes to change their password, myEZClaim will check to make sure that the password is not the same as any of the last six passwords that they used.
<b>Unused Account Days</b>	This configures how many days until an unused account is deactivated.
<b>Password Min Length</b>	This option sets the minimum length for a user’s password.
<b>Password Max Length (&lt;=12)</b>	This option sets the maximum length for a user’s password. The maximum length of passwords can be configured to be as high as 12 characters.
<b>Days to Keep Login History</b>	This configures how many days that login history of employees will be kept. The login history can be viewed from the HelpDesk page. <i>(See “HelpDesk Security” on page 169 for more information.)</i>
<b>Number of Permitted logins after Password Expiration</b>	This option sets the number of time a user can login with an expired password.
<b>Allowed IP for Login using Signature Starts With</b>	

3. After you have completed configuring the security for your account, scroll up to the top of the dialog and click the **Save** button to save the changes and exit the dialog box.

## WORKING WITH USERS

When you first setup MyEZClaim, you will need to create profiles and user logins for the people who will be using MyEZClaim. When you create the users, you will assign profiles to them that will allow them to add, edit or delete claims and print reports. You must have administrative rights (Administer Account role) to create users.

The following is a brief overview of the types of user roles also called actions.

Role	Description
<b>ACTIONS</b>	
<b>Site Administrator</b>	This role allows a user to do everything that a user with Administer Account can do. In addition, a user with this role can see and create new accounts, can allow other users to have the Site Administrator role, and create/modify codes and types listed on the Administration group tab. Only another Site Administrator can assign this role to a user.
<b>Account Administrator</b>	This user can create, modify, and delete Users, Claims, Lookups, and Messages. This user can send emails and run any report or form.
<b>Modify Account</b>	Allows a user to modify Consignees, Carriers, Shippers, Claimants, Companies, and Recipients.
<b>Read Account</b>	Allows a user to view Consignees, Carriers, Shippers, Claimants, Companies, and Recipients.
<b>Security Administrator</b>	This role has the ability to do everything that the HelpDesk Support role does. In addition, this role allows the user to create, edit, delete, and modify users and roles.
<b>Create Claims</b>	Allows a user to create claims. To print or email claims, a user must have the Run Standard Reports role.
<b>Modify Claims</b>	Allows a user to modify claims To print or email claims, a user must have the Run Standard Reports role.
<b>Delete Claims</b>	Allows a user to delete claims To print or email claims, a user must have the Run Standard Reports role.
<b>Read Claims</b>	Allows a user to view claims. To print or email claims, a user must have the Run Standard Reports role.
<b>Import Claims</b>	Allows a user to import claims from Microsoft Excel spreadsheets,
<b>Restrict Payment</b>	Prevents a user from entering a payment
<b>Restrict Close Claim</b>	Prevents a user from closing a claim

Role	Description
<b>ACTIONS</b> <b>(Continued)</b>	
<b>Create Lookups</b>	Allows a user to create the following lookups: Products Disposition Codes Release Values Conversion Rates Liability Limits Business Groups Product Lines
<b>Modify Lookups</b>	Allows a user to modify the following lookups: Products Disposition Codes Release Values Conversion Rates Liability Limits Business Groups Product Lines
<b>Delete Lookups</b>	Allows a user to delete the following lookups: Products Disposition Codes Release Values Conversion Rates Liability Limits Business Groups Product Lines
<b>Read Lookups</b>	Allows a user to view the following lookups: Products Disposition Codes Release Values Conversion Rates Liability Limits Business Groups Product Lines Status Codes Reason Codes Cancel Codes Rejection Codes Denial Codes Claim Types Payment Types Activity Types Document Types

Role	Description
<b>ACTIONS (Continued)</b>	
<b>Allow Claim Reversal</b>	Allows a user to reverse a claim
<b>HelpDesk Support</b>	Able to reset passwords, disable user accounts, and monitor login information. A user with only this role will be taken to <b>Security Helpdesk</b> page when they login.
<b>Restrict Change to Close Claim</b>	
<b>View Dashboard</b>	Allows a user to see the dashboard page.
<b>Modify Tasks</b>	Allows a user to update a task.
<b>Delete Task</b>	Allows a user to delete a task.
<b>REPORTS</b>	
<b>Report Claim Forms</b>	Allows the user to print claim forms
<b>Report Letters</b>	Allows the user to print claim letters such as Claim Acknowledgments and Claim Notifications
<b>Report Standard</b>	Allows a user access to report marked with an access level of “Report Standard”.
<b>Report Managements</b>	Allows a user access to report marked with an access level of “Report Management”.
<b>Report Administration</b>	Allows a user access to report marked with an access level of “Report Administration”.
<b>USER STATUS RESTRICTIONS</b>	
<b>Outstanding</b>	
<b>Closed</b>	
<b>Pending</b>	
<b>Suspended/ Cancelled</b>	

## CREATING A PROFILE

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Users**. The Users page opens and the shortcut button list expands. A list of users is displayed.
3. Click the shortcut for **Profiles**. The Profiles page opens. A list of Profiles is displayed.
4. Click the **Add Profile** button. The **New Profile** dialog box opens.

myEZClaim® Profile Properties - Internet Explorer provided by Dell

http://test2008.myezclaim.com/Navigation/My%20Account/Pages/Profiles\_Popup.aspx?refresh=true&targetId=0

**New Profile** Save Delete Close

name:

updated by:

last update:

**Actions the User will be Permitted**

Actions:	Reports:
<input type="checkbox"/> Site Administrator	<input type="checkbox"/> Report Claim Forms
<input type="checkbox"/> Account Administrator	<input type="checkbox"/> Report Letters
<input type="checkbox"/> Modify Account	<input type="checkbox"/> Report Standard
<input type="checkbox"/> Read Account	<input type="checkbox"/> Report Management
<input type="checkbox"/> Security Administrator	<input type="checkbox"/> Report Administration
<input type="checkbox"/> Create Claims	
<input type="checkbox"/> Restrict Close Claim	
<input type="checkbox"/> Create Lookups	
<input type="checkbox"/> Modify Lookups	
<input type="checkbox"/> Delete Lookups	
<input type="checkbox"/> Read Lookups	
<input type="checkbox"/> Allow Claim Reversal	

SELECT ALL / DESELECT ALL

**User Status Restrictions**

☐ Outstanding ☐ Pending

☐ Closed ☐ Suspended/Cancelled

SELECT ALL / DESELECT ALL

Done Internet | Protected Mode: On 100%

5. In the **Name** box, enter a descriptive name for the profile. This is what will be shown when you create a user.
6. Select the Actions, Reports, and User Status Restrictions that you want users with this profile to be able to do. See “Working with Users” on page 161 for more information. This section contains descriptions of the security roles, Actions and Reports.
7. Click the **Save** button to save the record. Click the **Close** button if you do not want to save this new record. Either way, you return to the profile listing window. If you saved the new profile, it is displayed in the list. Otherwise, there is no new entry.

The current date is automatically placed in **Last Update** and your name is automatically placed in **Updated By**. Whenever the record is modified or saved, this information is updated.

## EDITING AN EXISTING PROFILE

You can edit an existing profile at any time. The process of editing an existing profile is similar to that of creating a new profile. The changes to a profile will take effect when the user logs back into myEZClaim.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Users**. The Users page opens and the shortcut button list expands. A list of users is displayed.
3. Click the shortcut for **Profiles**. The Profiles page opens. A list of Profiles is displayed.
4. Click the profile you want to edit. The **Profile Properties** dialog box opens.
5. Make the necessary changes.
6. Click the **Save** button to save the changes. You will be returned to the profile listing page.

## DELETING AN EXISTING PROFILE

You can delete an existing profile at any time as long as they have not been assigned to a user. The process of deleting an existing profile is similar to that of creating a new profile.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Users**. The Users page opens and the shortcut button list expands. A list of users is displayed.
3. Click the shortcut for **Profiles**. The Profiles page opens. A list of Profiles is displayed.
4. Click the profile you want to delete. The **Profile Properties** dialog box opens.
5. Click the **Delete** button. A message is displayed asking “Are you sure you want to do this?” Click **OK** to delete the user, click **Cancel** to leave the user record and return to the listing window. If you click **OK**, the user record is permanently removed from the list, as long as it is not associated with any claims. If it is associated with any claims, an error message is displayed. Click **Close** to return to the address listing window.

## CREATING A USER

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Users**. The Users page opens. A list of Users is displayed.
3. Click the **Add User** button. The **New User** dialog box opens.

myEZClaim® User Properties - Internet Explorer provided by Dell

http://test2008.myezclaim.com/Navigation/My%20Account/Pages/Users\_Popup.aspx?refresh=true&targetId=0

**New User** [Save] [Delete] [Close]

full name:

employee id:

logon name:

logon password:  confirm password:

secret question:

answer to secret question:

email address:

region:

default currency:  US DOLLAR

is active: ☒ (Checked = True : Unchecked = False)

change password at next login: ☒ (Checked = True : Unchecked = False)

signature:  [Browse...]

allowed ip for login using signature starts with:

updated by:

last update:

[Address] [Phone #] [Profiles] [Filters] [Companies]

line 1:

line 2:

city:

state/province:

zip/country:  UNITED STATES

updated by:

last update:

Internet | Protected Mode: On 100%

4. In the **Full Name** box, enter the name of the user. This is what will be printed on claim forms and letters.
5. In the **Employee ID** box, enter the employee ID of the user.
6. In the **Logon Name** box, enter the logon name of the user. Logon names must be unique.
7. In the **Logon Password** box, type the password.
8. In the **Confirm Password** box, retype the password.
9. In the **Secret Question** box, enter a security question.
10. In the **Answer to Secret Question** box, enter the answer for the question.
11. In the **Email Address** box, enter the email address for the user.
12. In the **Region** box, select the region from the list.
13. Select the **Default Currency** for this user from the drop-down list.



14. By default, the **Change Password at Next Login** box is checked. If the user does not need to change the password, remove the check.
15. In the **Signature** box, select the signature file using the **Browse** button.
16. Enter the starting IP Address for using with signatures in the **Allowed IP for Login Using Signature Starts With** box.
17. Move to the **Line 1** box and enter the first address line.  
Some addresses may require two lines for the address. You can use **Line 1** and **Line 2** in these cases. For example, you can enter both the street address and the post office box information for a business. Move to the **Line 2** box, if necessary, and enter the second address line.
18. Move to the **City** box and enter the city.
19. Select a **State/Province** from the list. If the State/Province is not in the list, move to the **Country** box and select a country. Once you have selected a country you can enter the State/Province.
20. Move to the **Zip/Country** box and enter the zip code and select the country from the list. If you've entered both a street address and a post office box, enter the zip code for the post office box.
21. Click the **Phone #** tab.
22. Move to the **Phone/Ext** box and enter the phone number and extension.
23. Enter **Fax**, **Cellular**, and **Other/Ext** numbers in the appropriate boxes.



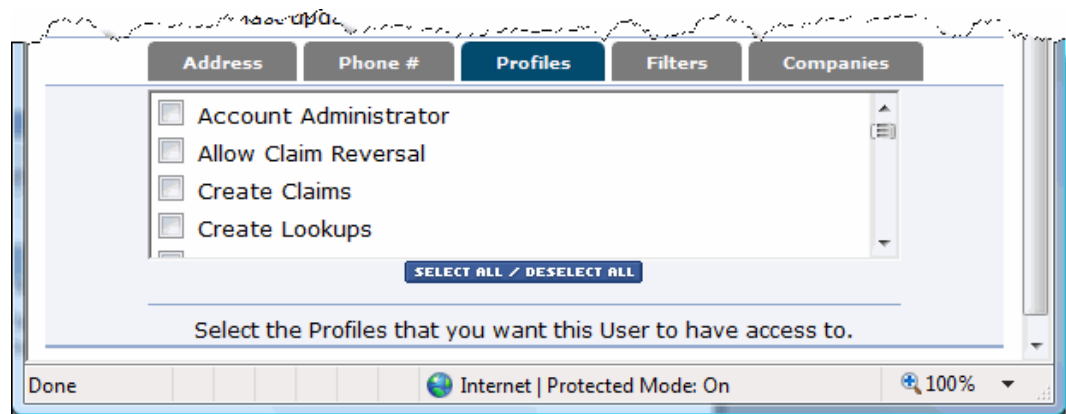
**NOTE:** You must save the record before you can assign Profiles, Filters, and Companies to the user.

24. Click the **Save** button to save the record. Click the **Close** button if you do not want to save this new record. Either way, you return to the user listing window. If you saved the new user, it is displayed in the list. Otherwise, there is no new entry.

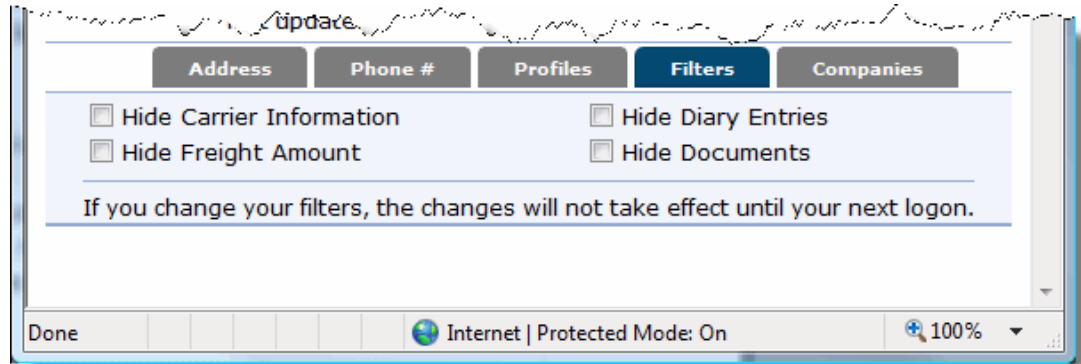
The current date is automatically placed in **Last Update** and your name is automatically placed in **Updated By**. Whenever the record is modified or saved, this information is updated.

## ASSIGNING ACCESS PERMISSIONS TO USERS

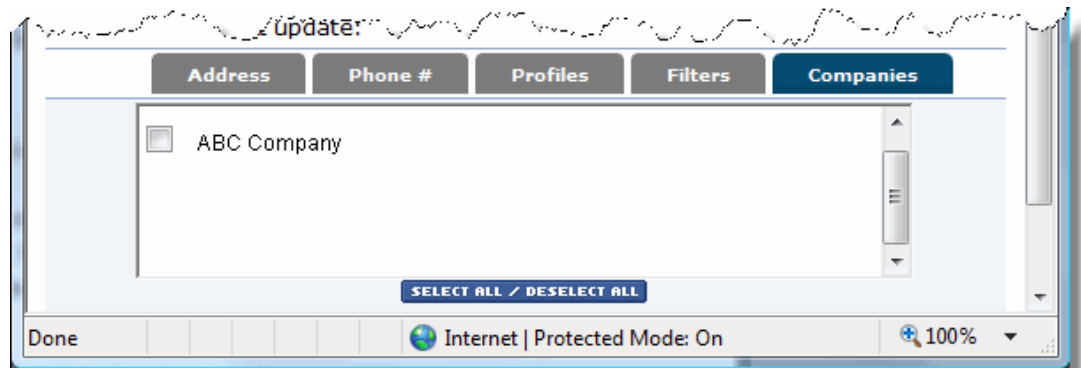
1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Users**. The Users page opens. A list of Users is displayed.
3. Click the user you want to assign Roles. The **User Properties** dialog box opens.
4. Click the **Profiles** tab.



5. Select the profiles that you want this user to have. The profiles listed were created prior to creating the user. If you need another profile, you will need to create more. See “Creating a Profile” on page 164 for more information.
6. Click the **Filters** tab.



7. If a user should not be able to see certain information on claim, check the box next to it. This will hide that information on the claim.
8. Click the **Companies** tab.



9. By default, the user has no permissions to companies. If the user should be able to access a company, enable that company by clicking the check box next to it. If the user should have access to all companies, click the **Select All/Deselect All** button. This will enable (check) all companies in the list.
10. Click the **Save** button to save the record. Click the **Close** button if you do not want to save this record. Either way, you return to the user listing window.

## EDITING AN EXISTING USER

You can edit an existing user at any time. The process of editing an existing user is similar to that of creating a new user.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Users**. The Users page opens. A list of Users is displayed.
3. Click the user you want to edit. The **User Properties** dialog box opens.
4. Make the necessary changes.
5. Click the **Save** button to save the changes. You will be returned to the user listing page.

## DELETING AN EXISTING USER

You can delete an existing user at any time as long as they have not created any records. If they have created records, you can disable that account instead. This prevents the user from logging into myEZClaim. The process of deleting an existing user is similar to that of creating a new user.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the shortcut for **Users**. The Users page opens. A list of Users is displayed.
3. Click the user you want to delete. The **User Properties** dialog box opens.
4. Click the **Delete** button. A message is displayed asking “Are you sure you want to do this?” Click **OK** to delete the user, click **Cancel** to leave the user record and return to the listing window. If you click **OK**, the user record is permanently removed from the list, as long as it is not associated with any claims. If it is associated with any claims, an error message is displayed. Click **Close** to return to the address listing window.

## HELPDESK SECURITY

The myEZClaim application makes it easy for your Helpdesk staff to manage user security. Users with the HelpDesk Support role are able to disable user accounts, enable user accounts, reset passwords, and monitor login information. When a user with the HelpDesk Support role log into myEZClaim, they are taken to the HelpDesk Security page.

MyEZClaim.net Member: Heather Munion | Company: Demo Site | Access Level: Help Desk Support  
Home | Help | Logout

---

**myEZClaim® Users** Add

**Users** **Login Info**

**Filter**

full name:  last login from:

login name:  last login to:

employee ID:

is active: ☒ all ☐ true ☐ false (Password Changed) Date From:

Password reset performed: ☒ all ☐ true ☐ false (Password Changed) Date To:

**Sorting** Full name  (Sort Desc)

login info	full name	employee ID	region	currency	login name	password	last login	pwd changed	is active	updated by	last update
<a href="#">Info</a>	Andy Demo		NORTH AMERICA	USD	standard	*****	Jan 03, 2006	7/3/2005 11:20:54 PM	True	myEZClaim® Administrator	Aug 06, 2006
<a href="#">Info</a>	Anne Smith		LATIN AMERICA	USD	asmith	*****	Sep 24, 2005	7/25/2005 10:19:18 PM	True	myEZClaim® Administrator	Aug 06, 2006
<a href="#">Info</a>	Heather Munion	heathermunion	NORTH AMERICA	USD	heather2	*****	Dec 12, 2005	9/3/2005 9:26:28 PM	True	myEZClaim® Administrator	Jan 18, 2006
<a href="#">Info</a>	John Demo	811	NORTH AMERICA	USD	demo	*****	Jan 14, 2009	1/13/2009 12:07:03 PM	False	John Demo	Jan 16, 2006
<a href="#">Info</a>	Josh Randolph		NORTH AMERICA	USD	joshjr	*****	Mar 16, 2006	2/8/2006 10:43:33 PM	True	myEZClaim® Administrator	Feb 08, 2006

This page shows a list of users and allows you to filter the list, search for users, or sort the list of users by employee name or ID. Users with administrative rights are shown in blue text.

To see the login information for a user, you can click the info link next to the users name or click the Login Info button to see the login information for the entire account. The login information includes the user’s last attempted login and lists whether or not the login was successful. In addition, the date of the login and what the IP address was.

## RESETTING A PASSWORD

Resetting a password is very simple. When a password is reset, the user is emailed a new password. When they login to myEZClaim, they are required to change their password.

1. Click the user you want to edit. The **User Properties** dialog box opens.
2. Click the **Reset** button. A message opens asking you to confirm the reset.
3. Click the **OK** button. The user is sent an email with the new password. When the user logs into myEZClaim, they will be prompted to change the password.

## DISABLING A USER ACCOUNT

When a user account is disabled, the user can no longer log into myEZClaim.

1. Click the user you want to edit. The **User Properties** dialog box opens.
2. Click the box next to **is Active**.
3. Click the **Save** button to save the record.

## WORKING WITH E-MAIL RECIPIENTS

When you first setup MyEZClaim, you will need to create e-mail recipient records for people who you will be e-mailing claims and documents. With myEZClaim you have the ability to e-mail claims and documents to multiple recipients. (See “E-Mailing Claims and Documents” for more information.)

### ADDING E-MAIL RECIPIENTS

The e-mail recipients list is an e-mail address book of people who you will be e-mailing claims and documents. E-mail recipients can be added at any time.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the **Recipients** shortcut button. The Email Recipients page opens.
3. Click the **Add Recipient** button. The **New Email Recipient** dialog box opens.

The screenshot shows a web browser window titled "myEZClaim® Email Recipient Properties - Internet Explorer provided by ...". The address bar displays the URL "http://86.124.36.102/myezclaimNet\_2008/Navigation/My%20Account/Pages/Recipients". The main content area is titled "New Email Recipient" and contains several input fields: "name:", "email:", "company code:", "updated by:", and "last update:". At the top right of the dialog box, there are three buttons: "Save", "Delete", and "Close". The browser's status bar at the bottom indicates "Internet | Protected Mode: On" and a zoom level of "100%".

4. In the **Name** box, enter the name of the e-mail recipient.
5. In the **email** box, enter the e-mail address of the recipient.

6. Click the **Save** button. Click the **Close** button if you do not want to save this new record. Either way, you are returned to the Email Recipients page. If you saved the new record, it is displayed in the list.

### EDITING E-MAIL RECIPIENTS

You can edit an existing e-mail recipient record at any time. The process of editing an existing record is similar to that of creating a new record.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the **Recipients** shortcut button. The Email Recipients page opens.
3. Select the recipient you want to edit. The recipient dialog box opens.
4. Make the necessary changes.
5. Click the **Save** button. Click the **Close** button if you do not want to save this new record. Either way, you are returned to the Email Recipients page. If you saved the new record, it is displayed in the list.

### DELETING E-MAIL RECIPIENTS

You should use caution when deleting an e-mail recipient record; once it is deleted it cannot be recovered.

1. Click the **My Account** group tab. The My Account page opens.
2. Click the **Recipients** shortcut button. The Email Recipients page opens.
3. Select the recipient you want to delete. The recipient dialog box opens.
4. Click the **Delete** button. A message is displayed asking “Are you sure you want to do this?” Click **OK** to delete the recipient, click **Cancel** to leave the record and return to the listing window. If you click **OK**, the record is deleted.

## WORKING WITH TASKS

To create a task that will be automatically generated when a claim is created you will need to configure email alerts, create a task group, task rules, and then add an auto-generated task through Manage Tasks.

### CONFIGURING TASK EMAIL ALERTS

Email alerts allow you to customize the message sent to people who you will be e-mailing claim tasks and reminders. By default, the messages are already configured for you. You will just need to add the messages that you want.

1. Click the **Tasks** group tab. The tasks page opens.
2. Click the **Task Configuration** shortcut. The **Task Configuration** expands showing a list of other options.
3. Click the **Email Alerts** shortcut button. The Email Alerts page opens.

4. Click the **Add Email Alert** button. The **Email Alerts** dialog box opens.

The screenshot shows a web browser window titled "MyEZClaim® Email Alerts - Windows Internet Explorer". The address bar shows the URL "http://share.myezclaim.com/MyEZClaimNet/Navigation/My Tasks/Pages/EmailAlerts\_Popup.aspx". The main content area is titled "Email Alerts" and contains the following fields:

- alert type:** A dropdown menu with the text "[SELECT AN EMAIL ALERT]".
- description:** A text area.
- disabled:** A checkbox.
- priority:** A dropdown menu with the text "Normal".
- subject:** A text input field.
- body:** A large text area.
- updated by:** N/A
- last update:** N/A

At the top right of the dialog box are buttons for "SAVE" and "CLOSE". The browser's status bar at the bottom shows "Done", "Internet", and "100%".

5. In the **Alert Type**, select the type of email alert you want to use:
- **Initial Email - New Task**  
This is the email that will be sent out to notify people that a new task has been created.
  - **2nd Request Notification Email**  
This email is sent when a task has not been completed by the due date.
  - **3rd Request Notification Email**  
This email is sent when a task has not been completed after the due date and the 2nd Request Notification

has already been sent.

■ **4th Request Notification Email**

This email is sent when a task has not been completed after the due date and the 3rd Request Notification has already been sent.

■ **Final Email - 'To Be Paid' Notification**

This email is sent when a task has not been completed by the specified due date. Once this email is sent, the task will be closed.

■ **Closed Task Email**

This email is sent to the configured task administration groups when a task is closed.

After you have selected an alert type, the email is automatically populated with text. The **Description** provides a brief description of the selected alert type.

6. Select the **Priority** for the email message. By default, it is set to "Normal".

7. In the **Subject** field, enter a new subject for the email. You can use special tokens in the subject line to have the information automatically populated when the email is created. Special Tokens allowed for the subject are:

- **%ClaimNumber%**  
This is the claim number from the claim.
- **%ClaimantName%**  
This is the name of the claimant from the claim.
- **%ARNumber%**  
This is the number from the **Acct Rec #** field on the claim.
- **%DueDate%**  
This is the due date for the task.

Example: If you wanted to have the subject notify the recipients that there is a new task for a claim and include the due date, you could enter the following text in the subject field: *New Task Alert: Claim # %ClaimNumber% Due by %DueDate%.*

If a claim was created with a claim ID of LD00000981 and a task due date of 4/12/2007, the subject line would be "New Task Alert: Claim # LD00000981 Due by 4/12/2007"

8. In the **Body** field, enter a new message for the email. You can use special tokens in the body to have the information automatically populated when the email is created. Special Tokens allowed for the body are:

- **%ClaimNumber%**  
This is the claim number from the claim.



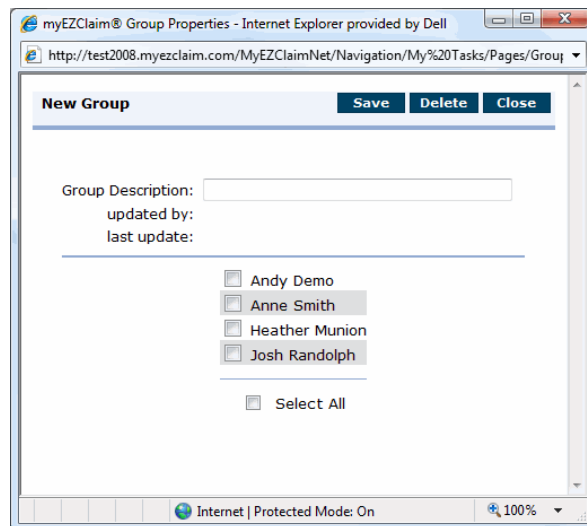
- **%ClaimantName%**  
This is the name of the claimant from the claim.
- **%Comments%**  
This is the **Comments** entered in the **Comments** field on the **Documents** tab of the claim.
- **%Description%**  
This is the task description.
- **%DueDate%**  
This is the due date for the task.
- **%ClaimURL%**  
Using this will add a link to the claim. When the user clicks this link, they will be taken to a login screen. Once they have logged into myEZClaim, the claim will open.

9. Click **Save** to save all of your changes. Add additional email alerts for each email alert you will be using.

## CREATING A GROUP

The task group list is an e-mail address book of people who you will be e-mailing claim tasks and reminders. Task groups can be added at any time. In order for a person to be added to a Task Group, they must first be a myEZClaim User.

1. Click the **Tasks** group tab. The tasks page opens.
2. Click the **Task Configuration** shortcut. The **Task Configuration** expands showing a list of other options.
3. Click the **Task Groups** shortcut button. The Task Groups page opens.
4. Click the **New Group** button. The **New Group** dialog box opens.



5. In the **Group Description** box, enter the name of the group.
6. Check the box next the user's name to add them to the group.
7. Click the **Save** button. Click the **Close** button if you do not want to save this new record. Either way, you are returned to the Groups page. If you saved the new record, it is displayed in the list.

## CREATING TASK RULES

The task rules list is a list of queries to be used when creating an auto generated task. Task rules can be added at any time.

1. Click the **Tasks** group tab. The Tasks page opens.
2. Click the **Task Configuration** shortcut. The **Task Configuration** expands showing a list of other options.

3. Click the **Task Rules** shortcut button. The Task Rules page opens.
4. Click the **New Task Rule** button. The **New Rule** dialog box opens.

5. In the **Code** box, enter the name of the rule.
6. In the **Field Name** box, select the business type for the rule.
7. In the **Operator** box, select “Does not Equal” or “Equal”
8. Select the status for the claim in **Claim Status**.
9. Select the **Claim Reason** from the list.
10. Click the **Find** button. The find business type dialog opens.
11. Select the business name from the list and click the **Apply** button. You are returned to the **New Rule** dialog box. The company you selected is listed.
12. Click the **Save** button. Click the **Close** button if you do not want to save this new record. Either way, you are returned to the Task Rules page. If you saved the new record, it is displayed in the list.

## CREATING AN AUTOMATED TASK

When you create an automated task, a task will be created every time a claim is created that meets the task rules for that automated task. To create an automated task, you must first create task groups and then task rules.

1. Click the **Tasks** group tab. The Tasks page opens.
2. Click the **Task Configuration** shortcut. The **Task Configuration** expands showing a list of other options.
3. Click the **Manage Tasks** shortcut button. The Manage Tasks page opens.

4. Click the **Add Task** button. The **New Task** dialog box opens.

5. In the **Task Description** box, enter a name for the new task.
6. Enter the number of days to complete the task in the **Days to Complete** box. By default, this is set to 7.
7. Enter the number of days until the Task group will be emailed a reminder for the task in the **Days until Notification** box. If "0" (zero) is entered, only the initial task notification will be mailed regardless of the number of notifications selected. By default, this is set to 7.
8. In the **Number of Notifications** box, select the number of notifications that will be sent to the task groups.
9. In **Task Priority**, select a priority from the list.
10. In the **Rules** section, place a check mark in the boxes next to the rules you want to use. When a new claim is created, the claim must meet all of the rules selected before a task will be created for a claim.
11. Click the **Groups** tab. A listing of the task groups you have created is shown.
12. Place a check mark in the boxes next to the groups you want to use. These are the groups that are responsible for completing the task.
13. Click the **Administration Groups** tab. A listing of the task groups you have created is shown.
14. Place a check mark in the boxes next to the groups you want to use. These are the groups that are notified when a task is completed.
15. Click the **Save** button. Click the **Close** button if you do not want to save this new record. Either way, you are returned to the Task Rules page. If you saved the new record, it is displayed in the list.



# FREQUENTLY ASKED QUESTIONS

MyEZClaim provides a number of management reports that assist you with tracking your claims and determining the efficiency of your carriers. MyEZClaim includes reports based on claim status, reason for closure, and amount recovered. In addition, there are accounting reports, including an accounts receivable report, cash receipt and write-off report. MyEZClaim also includes listings of the businesses, lookup values and products that you've entered.

These reports can be run by first clicking the **Reports** group tab, then clicking the desired shortcut (**Outstanding Reports**, **Detail Reports**, **Graphs Reports**, **Addresses Reports** or **Lookup Reports**), and finally selecting the appropriate report. The reports have several different delivery formats: Adobe Acrobat PDF (\*.pdf), Microsoft® Excel (\*.xls), Internet HTML (\*.htm), and Rich Text Format (\*.rtf). Adobe Acrobat PDF (\*.pdf) is the default.

The following is a list of the reports provided with MyEZClaim and a brief description of each report.

## WORKING WITH FILES

Each claim has a limit of 2MB total for file attachments. An attached file can be no larger than 2MB. When files are in color or contain lots of images, you can quickly reach the limit. This section covers a few tips and tricks to keep the file sizes down.

### HOW DO I DECREASE THE SIZE OF SCANNED FILES?

Scanned files can easily exceed the file size limit. You can decrease the dpi of scanned files to drastically reduce the file size. It is recommended that files be scanned as a black and white image with a resolution of 200 dpi in a PDF format. This will keep the file size down. Refer to your scanner's manual for instructions on setting up these parameters.

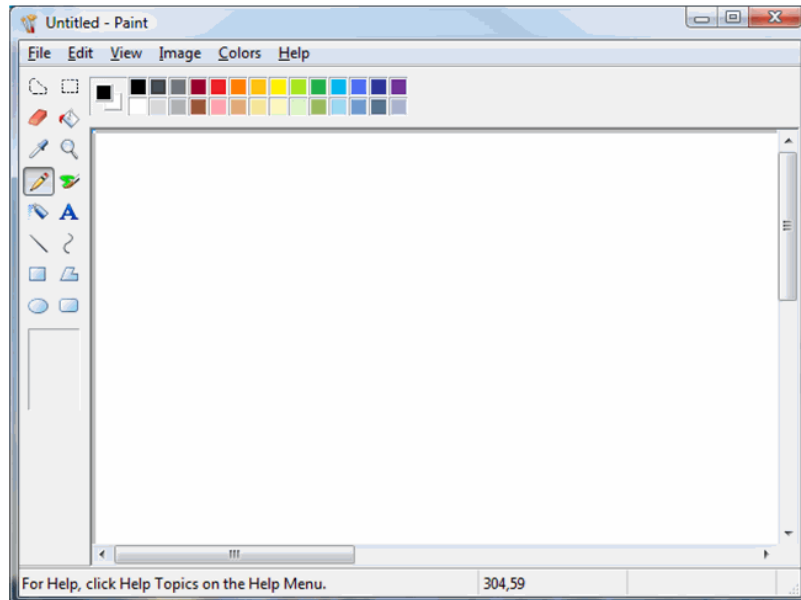
### HOW DO I DECREASE THE SIZE OF PHOTOGRAPHS?

When taking photographs to attach to a claim, use a lower resolution and save the file in a compressed file format. Examples of more commonly used compressed file formats are: .jpg, .gif, and .png. File formats that are not compressed are much larger. These file types are .tif and .bmp (Microsoft Paint). Refer to your camera's owner manual for instructions on taking lower resolution images and using compressed formats.

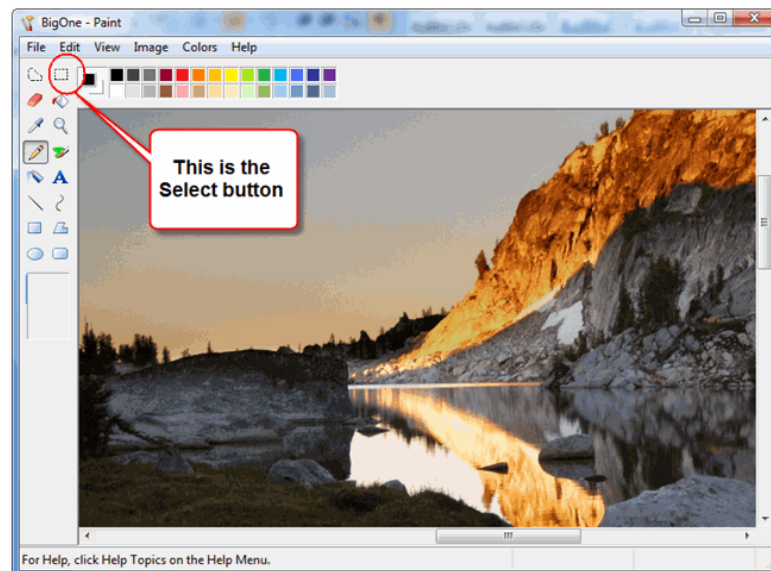
If you already have the images but they are large, you can decrease the size or crop the image by using a third-party graphics program. On newer operating systems, such as Vista, MS Paint has the ability to save images as .jpg. You can also decrease the overall photo in Paint or another graphics application.

## HOW DO I CROP AN IMAGE IN MS PAINT?

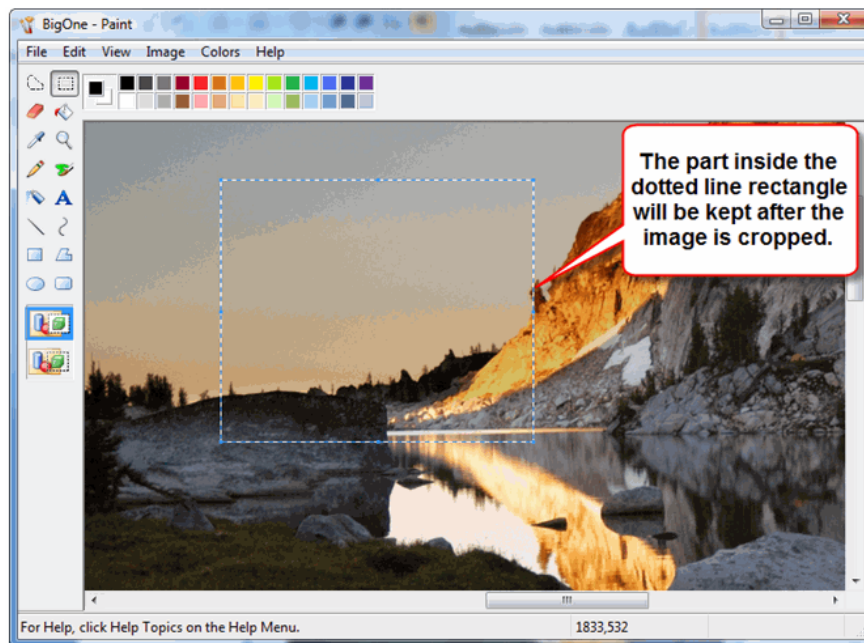
1. Click the **Start** menu.
2. Go to **All Programs --> Accessories** and select **Paint**. The **Microsoft Paint** application opens.



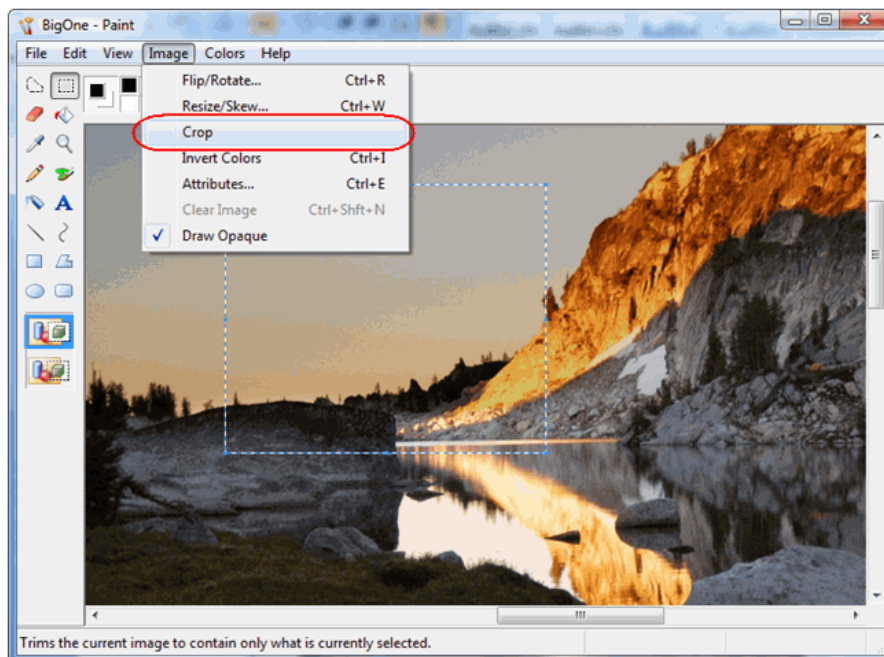
3. From the **File** menu, select **Open**.
4. Browse to the image you want to crop and open it. The image opens.
5. Click the **Select** button.



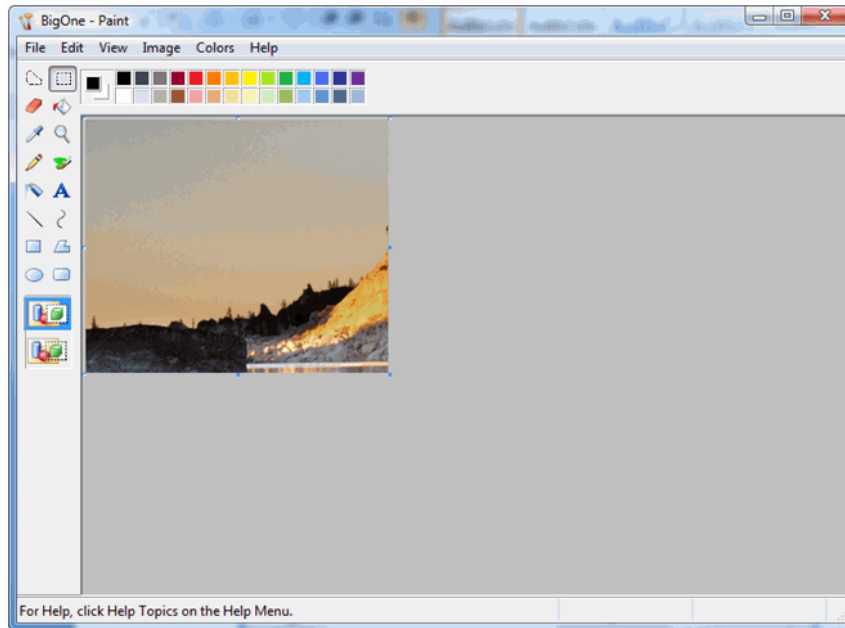
- Click and drag your mouse over the area you want to keep. This will place a dotted line rectangle around the area. The part inside the rectangle is what you will keep after the image is cropped.



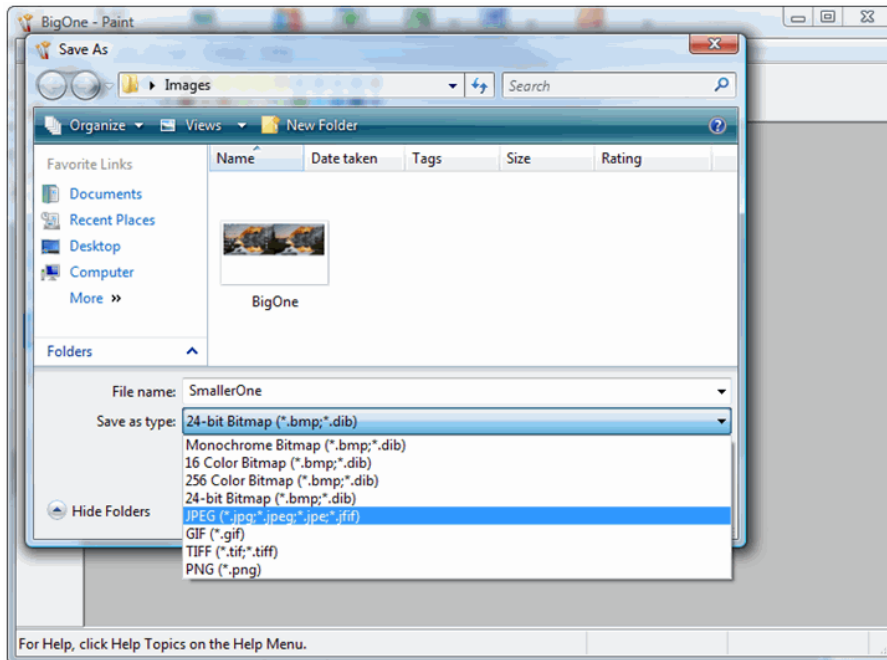
- From the **Image** menu, select **Crop**.



This will cut the image down to the selected portion.



8. From the **File** menu, select **Save As**.

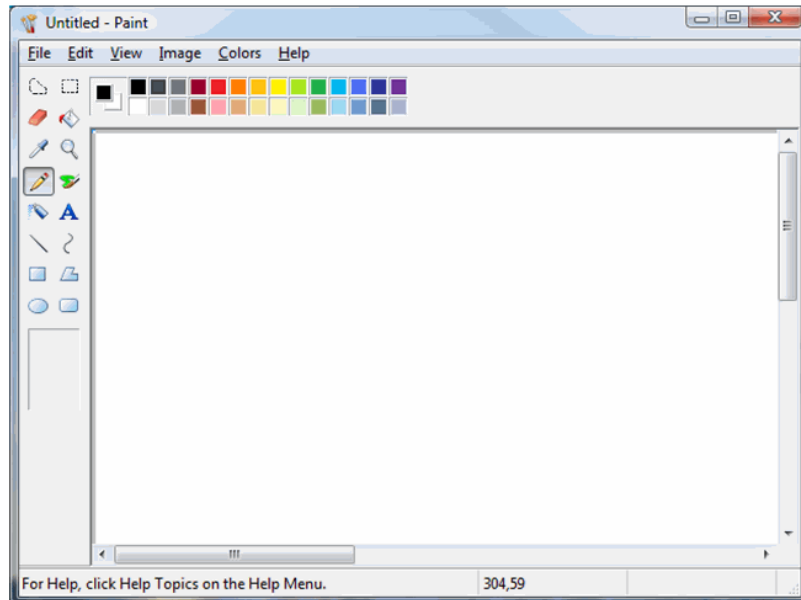


9. In the **File Name** box, enter a new name for the image and from the **Save as Type** list, select **JPEG**.

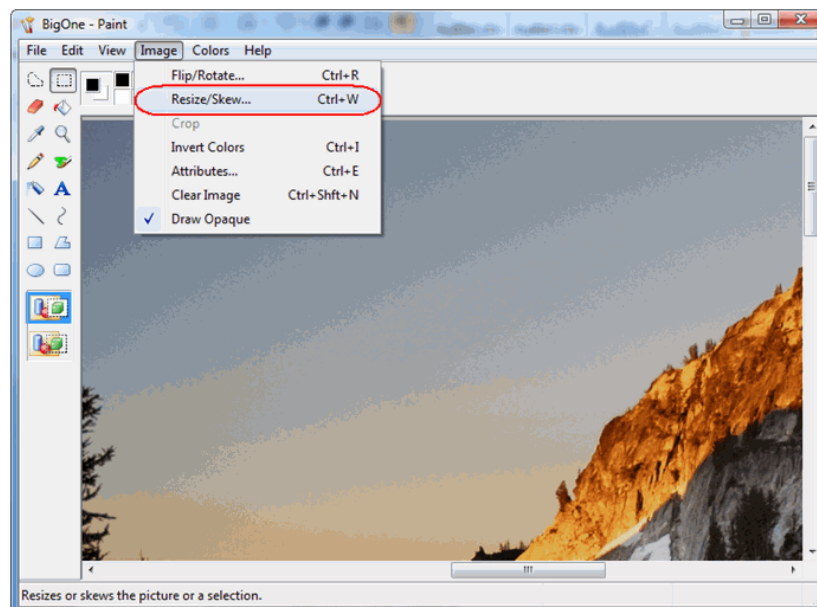


## HOW DO I DECREASE THE IMAGE SIZE IN MS PAINT?

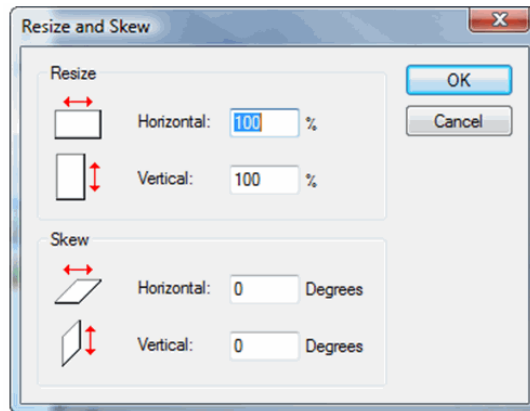
1. Click the **Start** menu.
2. Go to **All Programs --> Accessories** and select **Paint**. The **Microsoft Paint** application opens.



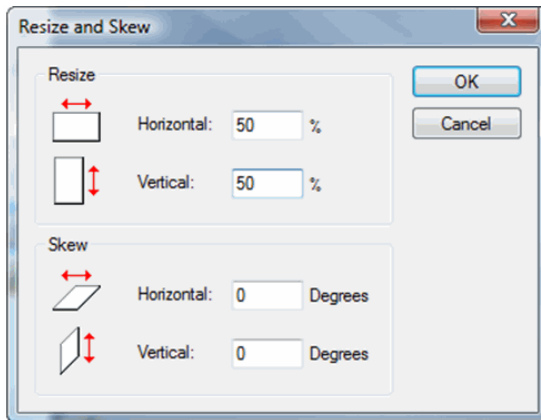
3. From the **File** menu, select **Open**.
4. Browse to the image you want to resize and open it. The image opens.
5. From the **Image** menu, select **Resize/Skew**.



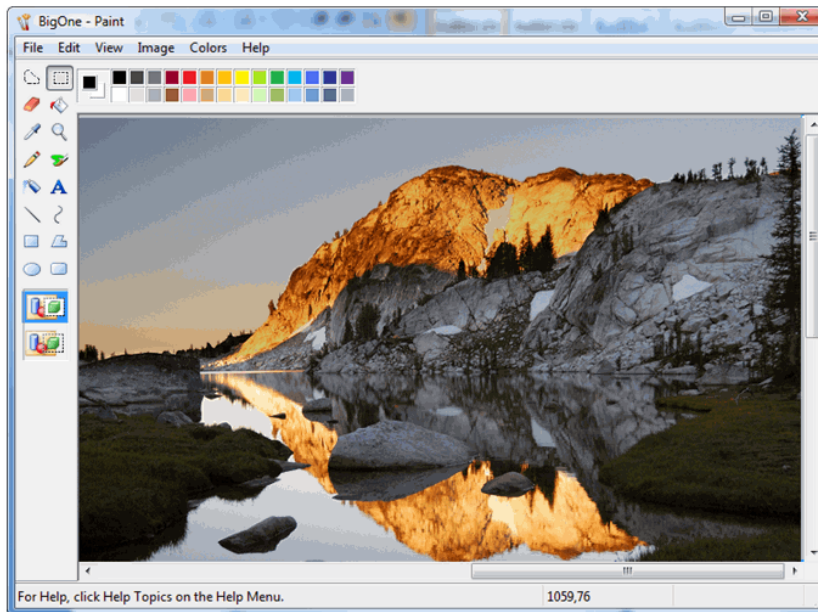
6. The **Resize/Skew** dialog opens.



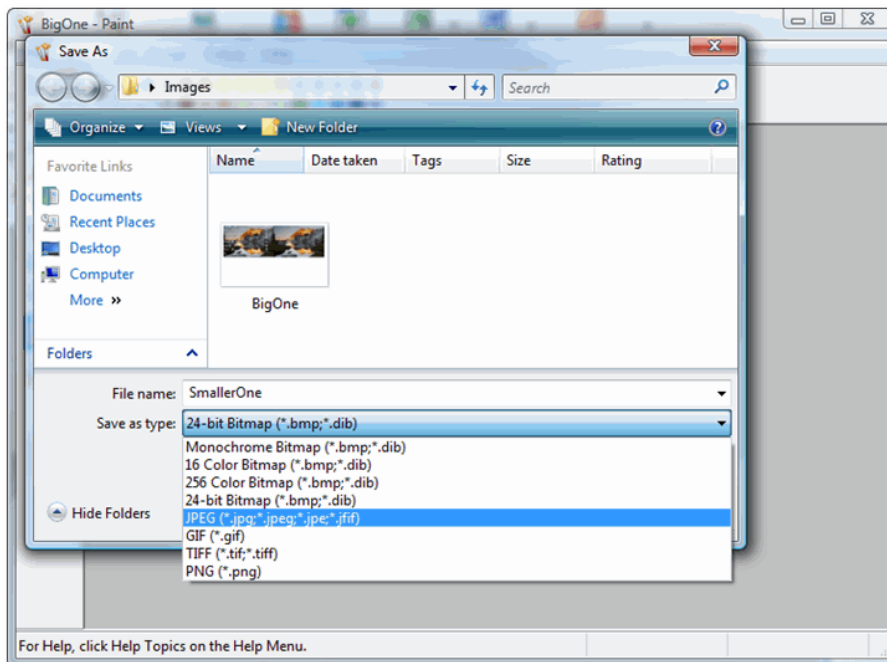
7. In the **Resize** section, enter new numbers for **Horizontal** and **Vertical**. For example, to make the image 50% smaller, enter 50 for both the Horizontal and Vertical fields.



8. Click the **OK** button. The image size is decreased to 50%.



9. From the **File** menu, select **Save As**.



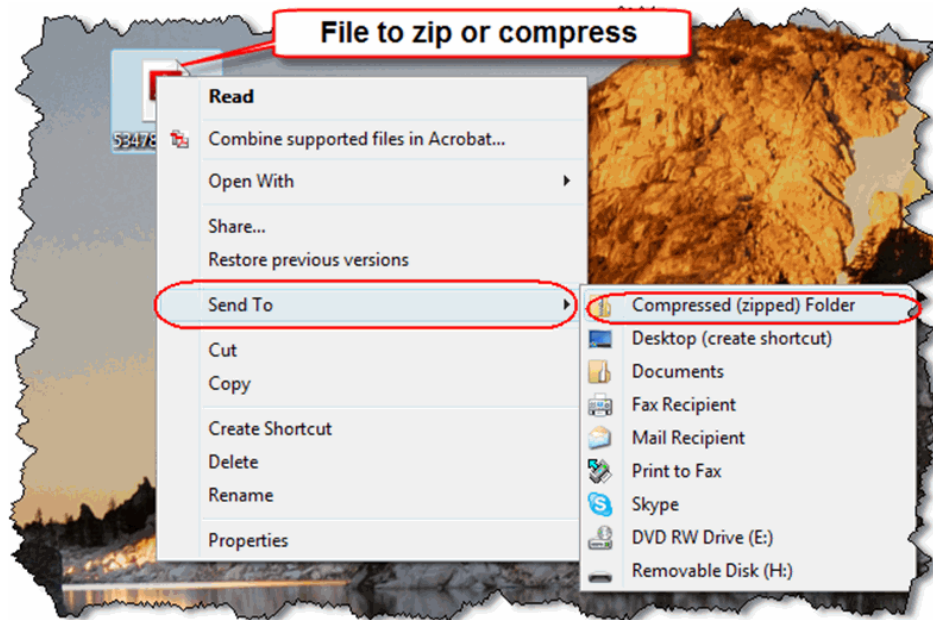
10. In the **File Name** box, enter a new name for the image and from the **Save as Type** list, select **JPEG**.

## HOW DO I CREATE A ZIP FILE FOR ATTACHING TO CLAIMS?

When working with the claims, you will occasionally need to zip files to decrease the size so that they can be attached to claims.

To zip or compress a file:

1. Right-click on the file you want to zip or compress and select **Send To** and then **Select Compressed (zipped) Folder**.



2. A new file is created. The zipped file is shown as a file folder with a zipper on it. This is the file to attach to the claim. It has the same name as the original file and can be opened by anyone.

















































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